2014 NEW ORLEANS CULTURAL ECONOMY SNAPSHOT

The Mayor's Office of Cultural Economy
City of New Orleans
Mitchell J. Landrieu

May 2015

Dear Friends and Colleagues:

I am pleased to present the 2014 New Orleans Cultural Economy Snapshot, the fifth edition of the groundbreaking report created at the beginning of my term as Mayor in 2010. My Administration has offered this unique, comprehensive annual review of our city's cultural economy not only to document the real contributions of the creative community to our economy, but also to provide them with the information they need to get funding, create programming, start a business, and much more. This report outlines the cultural business and non-profit landscape of New Orleans extensively to achieve that goal.

As we enter the decade following Hurricane Katrina and our recovery, the cultural economy is more important than ever. The cultural sector has 34,400 jobs, an increase of 15% since 2010. Since 2006, employment in our restaurant industry has risen by 82%, and in our entertainment industry, the number of jobs employing musicians, film workers, and other performers has increased 53%. Over this decade of recovery, the city has come back stronger, and the cultural economy has both re-established and created employment for a creative workforce that is both native to the city and made up of highly skilled newcomers.

Fifty-five feature film and television tax credit projects spent $514 million in the city, or 76% of their total budgets, in 2014, demonstrating the continuing establishment of the major film industry in New Orleans. Musicians in the city played 28,000 gigs in 2014 at clubs, theatres, or at many of the city's 130 annual festivals. Over 4 million attended our diverse national and local events last year, contributing to an economic impact of $916 million. While the economics are impressive, the cultural economy is more than just dollars, it is a cultural engine creating quality of life in the city, its unique sights, melodies, and flavors that our residents produce.

I look forward to what our cultural producers, workers, and practitioners have in store for New Orleans over our next ten years. If what we have accomplished since 2006 is any implication, than our city has a bright future ahead. I invite you to utilize this report so that we can maximize this impact and spread the word of the strength of our city's diverse cultural economy. Thank you to all who contribute data to this report, and to all of our cultural producers that make this report possible.

Sincerely,

Mitchell J. Landrieu, Mayor

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ACKNOWLEDGEMENTS

The Mayor's Office of Cultural Economy wishes to thank all of the cultural businesses and workers in New Orleans that make this city a prominent example of how the cultural economy is an economic engine in today's world.

Mt. Auburn Associates, Inc. in particular has, through its contributions to economic data and cogent analysis of employment, wages and non-profit financials in the cultural economy in New Orleans, allowed this survey to continue to break ground in cultural economy quantification. Beth Siegel of Mt. Auburn has been instrumental in the creation of this report through her guidance to source material and potential data sources. Thank you also to the Bureau of Revenue and the City's Geographical Information Systems; both were integral to completing this report.

We would also like to thank those who contributed important information and data to this report, including Louisiana Entertainment, Marci Schramm of French Quarter Festivals Inc., New Orleans Video Access Center, and all of our survey respondents without whom this report would not be possible.

TABLE OF CONTENTS

EXECUTIVE SUMMARY

Ten years ago, New Orleans experienced one of the most costly natural and man-made disasters in United States history. The losses in the economy were estimated in the billions, the human costs were incalculable. Today, our city is both less and more than it was in 2005; essentially, it is different. The cultural economy was reaching an all-time high in 2004, but it had to start again in 2006 from almost nothing. We are proud to present the 5th *New Orleans Cultural Economy Snapshot*, an attempt at fully quantifying the re-birth and re-growth of the cultural economy in New Orleans over the last 10 years. This Snapshot is a tool to better understand the size, composition, and value of the cultural economy to the City of New Orleans, and we hope that it can be used by government, cultural producers, businesses, and non-profits to further opportunities to grow this industry and to continue to look towards our city's future. This report affirms the centrality of indigenous arts and culture in the creation of our City's organic fabric of neighborhoods and communities, as well as our economy. The cultural economy is vital to New Orleans:

- New Orleans' cultural industries accounted for 34,381 jobs in 2014.
- While employment in the city fell by about 19% from 2002-2014, the number of jobs in city's cultural industries grew by 15%.
- The cultural sector was one of the few industries to experience positive employment growth (15.5%) between 2002 and 2014.
- New Orleans had the highest increase in cultural jobs between 2006 and 2014 when compared to San Francisco, Austin, and New York.
- The number of jobs in motion picture and video production grew almost tenfold, from 286 in 2002 to 2,783 at the beginning of 2014.
- There were 1,658 cultural businesses in New Orleans in 2014, 4.5% more than in 2013.
- $1.2 billion in wages were paid to New Orleans cultural workers via cultural businesses in 2014, up 2% from 2013.
- The city hosted 55 total feature film and television tax credit projects in 2014.
- Local spending of film projects is estimated at $512 million for the New Orleans Region, a 12.6% increase from 2013.
- New Orleans' 116 live entertainment venues hosted 28,100 live entertainment gigs in 2014.
- The local festival scene is thriving, with 130 festivals attended by an estimated 4 million people in 2014. This is a 25% increase in estimated attendance from 2010.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

CULTURAL JOBS IN CULTURAL BUSINESSES[1]

DEFINING THE CULTURAL ECONOMY

Cultural Economy is defined as the people, enterprises, and communities that transform cultural skills, knowledge and ideas into economically productive goods, services and places. The definition of the cultural economy used for this report is consistent with the previous updates, and is based upon the 2005 report *Louisiana: Where Culture Means Business*.[2] That report grouped the state's cultural economy into six key segments:

- Culinary Arts: Food-related cultural products including food processing, specialty food products and locally-owned, full service restaurants (does not include franchise/non-local chain restaurants);
- Design: Individual designers and firms involved in the communication arts such as graphic design, printing, and advertising;
- Entertainment: The performing arts (music, theater, and dance), individual performers, and the film and media industries;
- Literary Arts and Humanities: Individual writers and editors and book, periodical, and newspaper publishing;
- Preservation: Economic activities focused on the restoration and redevelopment of the built environment including architecture, landscape architecture and a percentage of construction activity focused on preservation and renovation; and
- Visual Arts and Crafts: Individual artists and craftspeople as well as the galleries and museums that present cultural products.

CULTURAL JOBS IN NEW ORLEANS

New Orleans' cultural industries accounted for 34,381 jobs in 2014, including 25,610 wage and salary jobs and 8,771 jobs from self-employment. The cultural sector has become one of the largest industry sectors in the city. Between 2002 and 2014, New Orleans' cultural industries became an increasingly important part of the city's economy. While employment in the city fell by about 19 percent across this period, the number of jobs in city's cultural industries grew by 15 percent, despite shedding nearly 10,000 jobs between 2004 and 2006 due to

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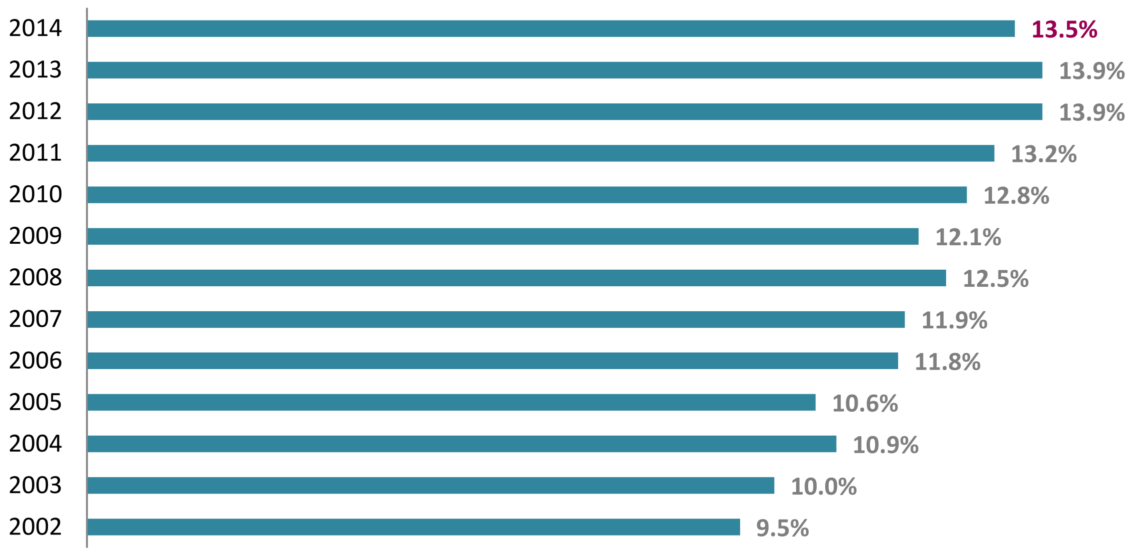
[1] This entire chapter was researched by Mt. Auburn Associates, commissioned by the Mayor's Office of Cultural Economy. The format, figures, and text have been edited to suit the purposes of this report and conform to the format of the publication.

[2] The data sources used in this report are from EMSI. EMSI's complete data set included employment (wage and salary workers) as well as the self-employed and sole-proprietors. The individual industry and occupational estimates for the period 2002 to 2014 may vary slightly from previous updates as EMSI revises data to account for newly released information and algorithmic refinements. These adjustments, when they occur, are minor. Two other refinements were also made to base business data to arrive at the most accurate depiction of New Orleans' cultural economy: 1) for industries with estimates of less than 10 employees, final numeric approximations were based upon industry trends; and 2) the large, catch-all independent artists industry was broken out using staffing patterns data to better target, and include, only those individuals working within the creative economy.

Hurricane Katrina. In 2002, the creative industries accounted for 9.5 percent of all local employment; by 2014, this had risen to 13.5 percent.

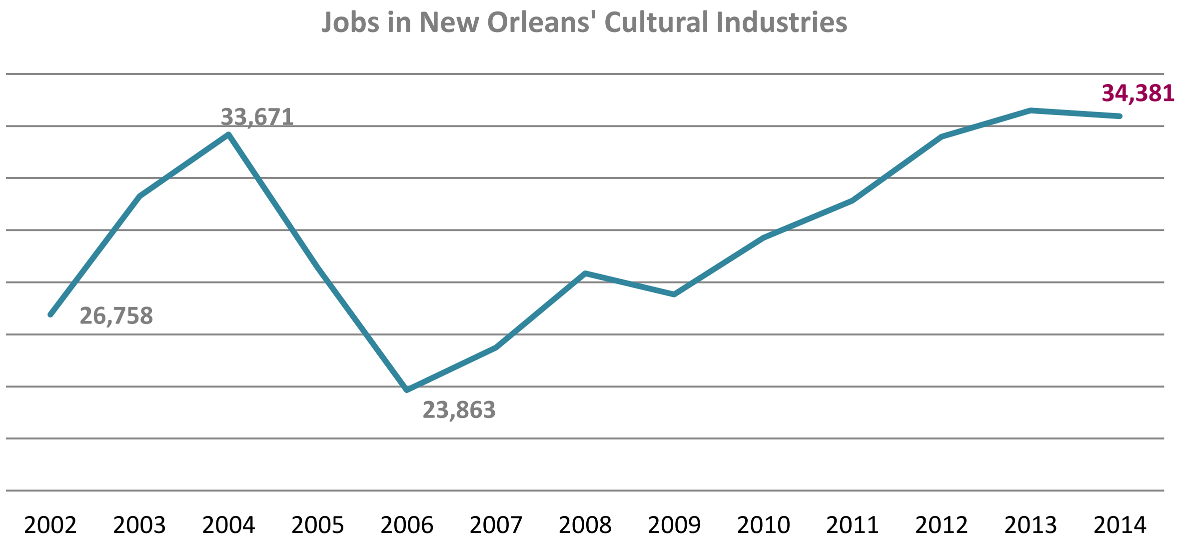
With more than 34,000 jobs, the cultural sector is now a significantly larger employer than the city's private healthcare and social assistance sector (23,741 jobs), its private education sector (21,006 jobs, including charter schools), and its retail sector (16,274 jobs). In 2014, for the first time, it also had more jobs than the city's entire public sector (33,246 jobs). The two sectors with more jobs than the cultural industries—tourism and accommodation/food services—overlap with the cultural industries. Only two of the city's industry sectors in 2014 had a higher 2002-2014 employment growth rate than the creative industries: "Educational Services (Private)," which grew because of the transfer of jobs from traditional public schools (counted under government) to charter schools (counted under private education) and "Real Estate Rental and Leasing."

Jobs in Cultural Industries as a Share of all Jobs in New Orleans



Highest Growth New Orleans' Jobs by Industry, 2002-2014

Industry Categories	2002 Jobs	2014 Jobs	% Change (2002-14)
Educational Services (Private)	16,377	21,006	28.3%
Real Estate and Rental and Leasing	9,161	10,696	16.8%
Cultural Industries	29,758	34,381	15.5%
Professional, Scientific, and Technical Services	19,694	21,518	9.3%
Accommodation and Food Services	35,730	38,675	8.2%
Construction	8,758	8,468	-3.3%
Tourism	43,418	41,745	-3.9%
Other Services (except Public Administration)	17,360	16,429	-5.4%
Health Care and Social Assistance	31,422	23,741	-24.4%
Life Sciences	21,972	16,324	-25.7%
Retail Trade	22,163	16,274	-26.6%
Government	62,954	33,246	-47.2%

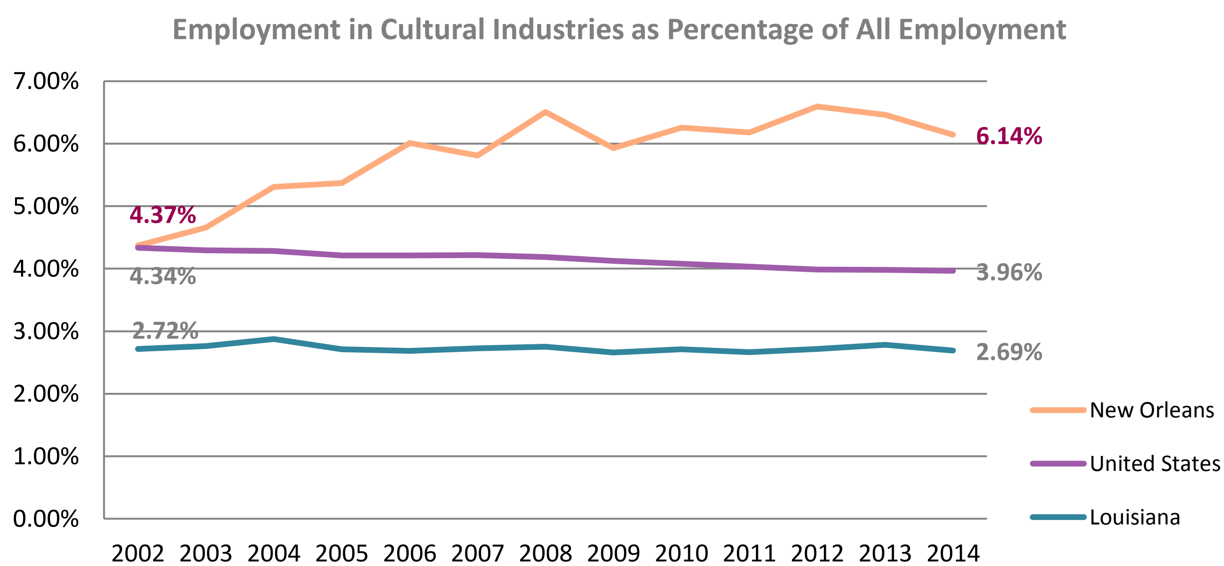


In the years following Hurricane Katrina, the creative industries were in recovery mode, adding more than 1,300 jobs per year on average between 2006 and 2014. By the end of this period, there were more jobs in the cultural sector than there were before Katrina hit. There has been a small dip in the number of jobs between 2013 and 2014 of -0.6 percent.

In spite of the tremendous impact of Hurricane Katrina on the city's economy, New Orleans' cultural industries had a higher overall rate of job growth between 2002 and 2014 than the cultural industries at the state or national levels. The graph on page 9 compares job growth over time in the "core cultural industries"[3] in New Orleans to job growth in the same set of industries in Louisiana and the United States as a whole. As the graph shows, the cultural industries grew rapidly in New Orleans between 2002 and 2004, but then declined dramatically over the next two years, opening up a large gap between the city's cultural sector job growth rate (measured from 2002) and the state and national rates. After 2006, the city's cultural sector began to grow quickly once again, and by 2011 it had closed the gap. The overall job growth rate of the city's core cultural industries for the 2002-2014 period was 16.7 percent, which was higher than the state rate (13.4 percent) and much higher than the national rate (4.5 percent).

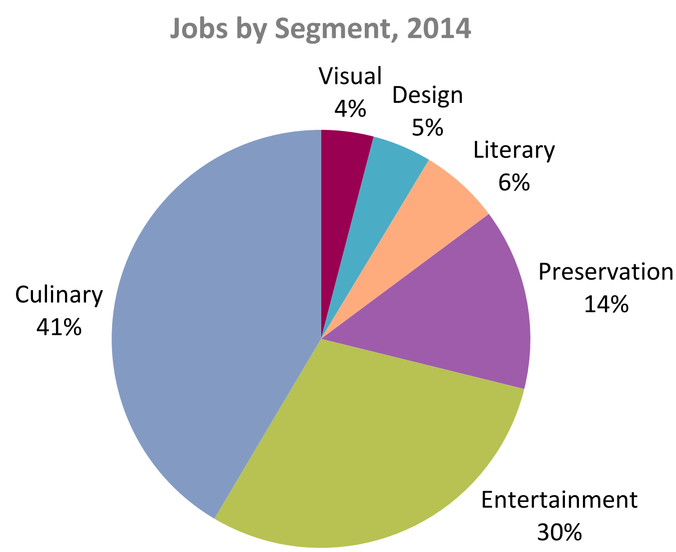
[3] Core cultural industries is a set of industries that is used in this update whenever New Orleans is being compared with a different geography. It includes all the industries in the New Orleans cultural economy definition except for those that would make comparison problematic: all the industries in the culinary segment, the architectural preservation/rehabilitation industries in the preservation segment, and bars in the entertainment segment. Jobs in these industries were all included in the New Orleans data definition because of specific connections to New Orleans culture and, in many cases, only a certain proportion of the jobs in the industry code was included. (See Methodology section for more detail.) These proportions were estimates based on research on New Orleans businesses, and the proportion of jobs that are cultural in these industries in the U.S. would almost certainly be smaller.

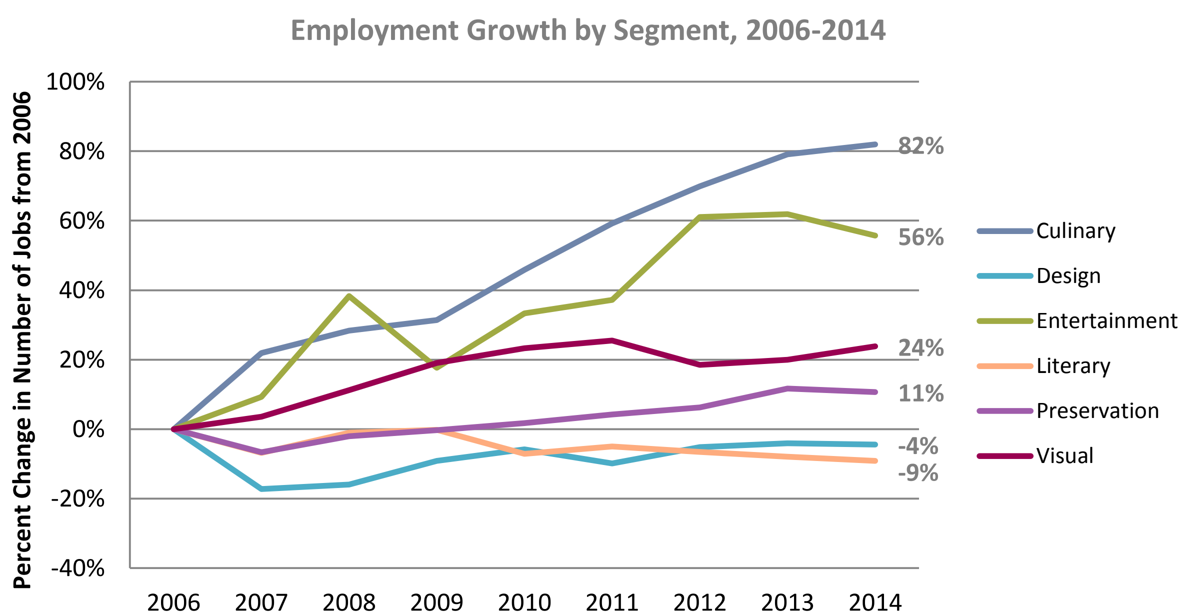
If cultural employment is expressed as a percentage of total employment (see below), then the cultural employment of New Orleans from 2002-2014 has dramatically surpassed that percentage in the U.S. and Louisiana. In 2002, the core cultural industries were responsible for 4.4 percent of all jobs in New Orleans. This was almost exactly the same as the national average at the time (4.3 percent). By 2014, the share in New Orleans had risen to more than 6.1 percent, but nationally it had actually fallen to just below 4 percent. This means that in 2014 New Orleans' core cultural industries had a location quotient (LQ) of 1.55—the number of total New Orleans cultural employment was 55 percent larger than cultural employment nationally.



CULTURAL JOBS BY SEGMENT

New Orleans' two largest cultural segments, Entertainment and Culinary Arts, each have more jobs than the other four cultural segments combined. The Entertainment and Culinary segments also account for most of the job growth in recent years. While the total number of jobs in the city's economy fell by 19 percent between 2002 and 2014, the Entertainment and Culinary segments had their job numbers increase by 55 percent and 19 percent, respectively. By 2014, the Culinary segment accounted for approximately 14,265 jobs, 41 percent of total cultural sector employment, and the Entertainment sector accounted for approximately 10,195 jobs, 30 percent of total cultural employment.





Since 2006, the Culinary and Entertainment segments have grown dramatically. There are 82 percent more jobs in Culinary Arts in 2014 compared to 2006. This growth is directly connected to the restaurant industry in the city, which has exploded since 2005, and this report counts 900 restaurants and specialty food stores such as bakeries or snoball stands, all locally owned and operated. Entertainment has grown 56 percent in the same time period, coinciding with a large increase in film activity, as well as the recovery of the club music scene.

The share of total core cultural employment in New Orleans is 55 percent higher than that in the U.S. as a whole, or, in other words, the core cultural industries, put together, have a national employment location quotient of 1.55. The table below shows how concentrated each of the city's core cultural industry segments is compared to the nation and Louisiana. The Culinary segment is excluded because there is no way to differentiate local and national businesses for the state and national economies as this report does in New Orleans.

Concentrations of New Orleans Cultural Jobs, 2014

Segment	Compared to United States	Compared to Louisiana
Design	0.75	1.55
Entertainment	1.93	2.86
Literary	1.16	1.75
Preservation	2.21	2.68
Visual	1.53	1.62
Cultural Industries (Overall)	**1.55**	**2.28**

The segment that is most highly concentrated in New Orleans compared to the nation as a whole is Preservation, which has a national LQ of 2.21 in the city. This means that the segment's share of total employment in New Orleans is 2.21 times as high as its share of total employment nationally. Entertainment is 2.86 times as high in New Orleans than in the state of Louisiana.

The table to the right compares job growth between 2006 and 2014 in 12 major cities.[4] During this time period, New Orleans had the highest growth in cultural jobs compared to the other 11 cities, including cultural centers such as San Francisco and New York, with 28% growth in jobs over the last 8 years. Up and coming cities such as Austin, Charlotte and Pittsburg also had less growth in cultural jobs compared to New Orleans.

Change in Core Cultural Industry Employment, 2006-2014

Metro Area	2006	2014	% Change
New Orleans, LA	12,186	15,608	28%
San Francisco, CA	63,691	76,833	21%
Austin, TX	44,029	53,058	21%
New York City	426,748	495,320	16%
Portland, OR	39,777	45,221	14%
Seattle, WA	121,958	137,806	13%
Charlotte, NC	29,285	32,793	12%
Nashville, TN	40,536	44,526	10%
Houston, TX	74,862	80,245	7%
Pittsburg, PA	37,249	38,632	4%
Los Angeles, CA	483,601	488,690	1%
Atlanta, GA	61,502	59,132	-4%

4 The comparison is actually between Orleans Parish (county) and the counties that most closely adhere to the other cities' borders. Orleans Parish borders are identical to the city limits.

CHEFTREPENEURS

The restaurant scene is booming. Since 2010, this report has tracked a 22.5% increase in Full Service Restaurants. Employment in the restaurant industry is also rocketing; since 2006, employment in restaurants has almost doubled, increasing by 99%. Specialty Food Stores, which include bakeries, prepared seafood stores, coffee shops, juice bars, snoball stands, po-boy purveyors, and much more, have increased 35.6% since 2010.

The nation is starting to pay attention to our vibrant dining scene too. Our local chefs are becoming nationally recognized and showered with accolades from the James Beard Foundation to *Chopped*. These innovative chef entrepreneurs have opened multiple restaurants with a range of dining styles and concepts, diversifying the industry. As local food critic Ian McNulty pointed out in May of 2014, these chefs are not only expanding, but doing it rapidly, "What's most amazing to me about these three restaurant expansions is that the [three restaurants] each opened within just a day of each other." Indeed, the *New York Times* pointed out in 2013 that by 2010, "New Orleans already ranked 14th in the nation on restaurants per person," and that New Orleans has developed "an industry cluster along the lines of the financial industry on Wall Street or high technology in Silicon Valley." Our dining scene has not just recovered; it has evolved into a much richer industry that is nationally recognized.

CULTURAL JOBS IN NON-CULTURAL INDUSTRIES

In addition to the jobs counted in cultural industries in the first section of this chapter, there are thousands of cultural workers in the city who work for employers outside the cultural industries. If these jobs are included, there are probably close to 38,000 jobs in the city's cultural economy.

There are approximately 2,744 cultural jobs outside the cultural industries. However there are hundreds, and perhaps thousands, of other cultural workers not counted in this total because their jobs are counted in broad occupation codes such as "elementary and secondary school teacher," or because they are self-employed.[5] An analysis of other data sources suggests that there could be roughly 700 cultural teaching positions at local primary, secondary, and postsecondary schools. Adding this figure to the original figure of 2,744, a conservative estimate of the total number of jobs in cultural occupations not counted in the industry data would be 3,400.

Cultural workers are employed throughout the non-cultural industries, but there are particularly large clusters of them working in education, religion, and hospitality. The most important employers of cultural workers outside the cultural industries are the city's institutions of higher education. There are more than 500 cultural jobs at colleges, universities, and professional schools. This number does not include librarians or library technicians, since this report counted jobs in these occupations as working in a cultural industry. It also does not include professors or other postsecondary teachers. About 10 percent of Louisiana postsecondary teachers teach artistic,

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[5] The figure presented here only includes wage and salary workers, since the staffing patterns published by EMSI are not as accurate for self-employed workers due to an underlying lack of data. In general, it is safe to assume that the cultural industry data already counts self-employed cultural workers; however, certain types of self-employed cultural workers may be counted in other industries, so this should be considered a conservative estimate.

creative, or cultural subjects. If the percentage were the same in New Orleans, there would be approximately 461 cultural teaching jobs in higher education and close to 1,000 cultural jobs in total.

Another major non-cultural employer of cultural workers is the K-12 school system. However, there is no publicly available data on the number of teachers in New Orleans who primarily teach cultural subjects. If New Orleans had the same ratio of students to cultural teachers as New York State though (one of the few states where good data are available), there would be at least 231 cultural teaching jobs in the city's public/charter schools, counting only the arts, not English or history.

Beyond educational institutions, some of the largest employers of cultural workers are churches and other religious organizations. There are roughly 250 jobs in cultural occupations working in this area—mostly musicians, singers, and music directors.

There are also many cultural workers who work for non-cultural employers in the private sector. One important employer of cultural workers is the hospitality industry. Casino hotels, other hotels, and motels in New Orleans employ approximately 321 cultural workers, including about 70 chefs.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

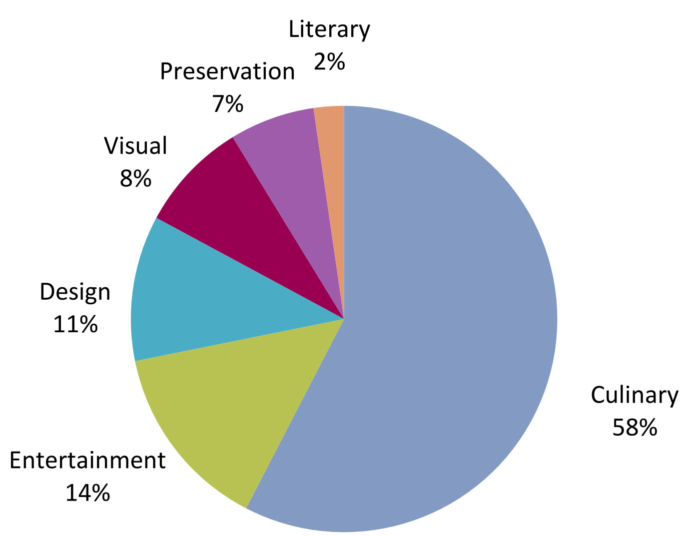
BUSINESSES

Cultural businesses are locally owned or operated and provide a service or product in one of the six cultural economy segments defined on page 3. National chain restaurants are excluded from the data so that the large Culinary sector truly reflects local talent. Other national and international companies that do not have a significant employment presence in the parish or do not do work in Orleans Parish were excluded from the data in order to give a better picture of New Orleans' cultural economy.[6]

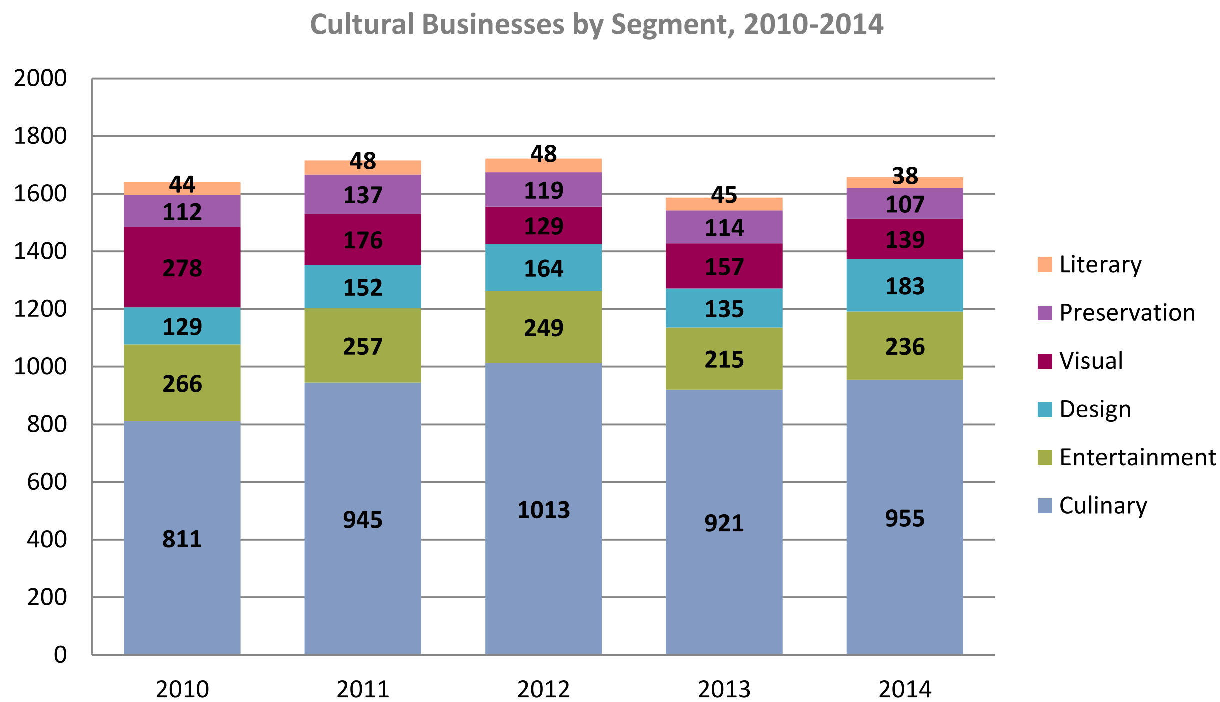
Most cultural businesses in New Orleans are small businesses, concentrated along the following neighborhood corridors: Magazine Street, Uptown, the Lower Garden District, Carrollton Avenue, the French Quarter, the Warehouse District in Downtown, the Marigny, Treme, Harrison Avenue in Lakeview and Mid-City. Altogether, these neighborhoods account for 75% of cultural businesses in New Orleans.

This survey found 1,658 cultural businesses in New Orleans in 2014 ranging from cooking schools, restaurants, art galleries, and architects; to independent presses, music venues, specialty plasterers, and graphic design firms. There are 4.5% more cultural businesses in 2014 than in 2013. Design had a large increase of 35% from last year. This is mostly due to a greater inclusion of freelancer graphic designers that obtained occupational licenses. Entertainment businesses increased by 10%, mostly through a greater inclusion of new and old small, independent dance studios, recording studios, and music retailers. The largest decrease (15%) was in Literary, mostly due to the closing of small publishing businesses.

2014 Cultural Businesses by Segment, 2014



[6] Please note that "Businesses" does not include non-profits. Cultural non-profits are covered in the Non-Profits section. It also does not include public institutions such as libraries, although university presses are included.



START-UP NOT START-OVER

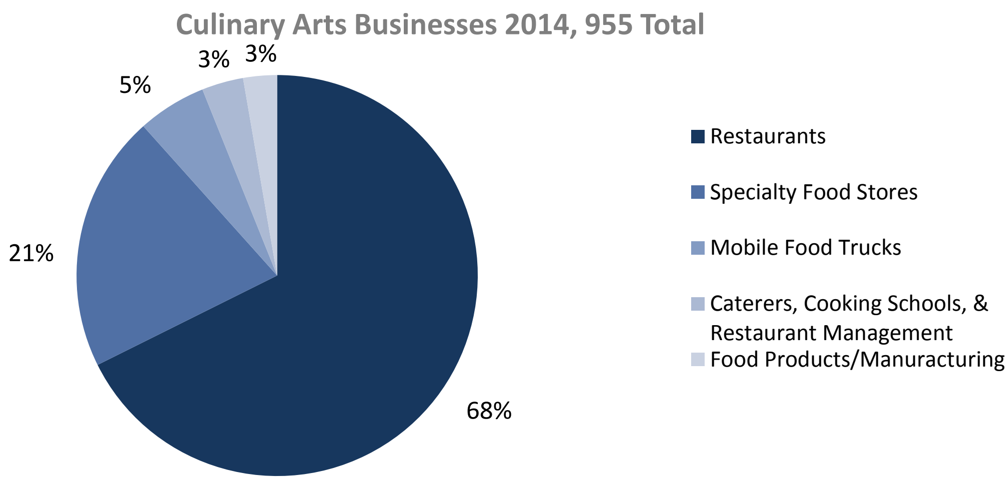
Between 2005 and 2008, the rate of opening of start-up businesses in New Orleans doubled, according to The Data Center. More recently, from 2009-2012, the start-up rate exceeds the national rate by 56%! New Orleans is not just rebuilding its damaged or lost industries, it is a fertile environment for an entrepreneurial culture that is nourished by the invention of both locals and new citizens, who are attracted to our culturally unique way of life. As *The Atlantic* noted in 2013, “If New Orleans has a competitive advantage, this is it: A reputation for fun, along with a culture of engagement and a civic awareness sharpened by recent tragedy.”

One of these new start-ups is Where Y’Art, an online store and artist gallery for local artists. The site allows artists to describe their artistic vision, to explain the meanings behind each work for sale, gives them a 24 hour sales platform, allows them to connect to and chat with art lovers and consumers, provides them with a set media platform that is professionally designed, and promotes their products online. Finally, $1 of every sale contributes to a grant for artists. Where Y’Art is a great example of a start-up that effectively synthesizes culture, community, and commerce.

BUSINESSES BY SEGMENT

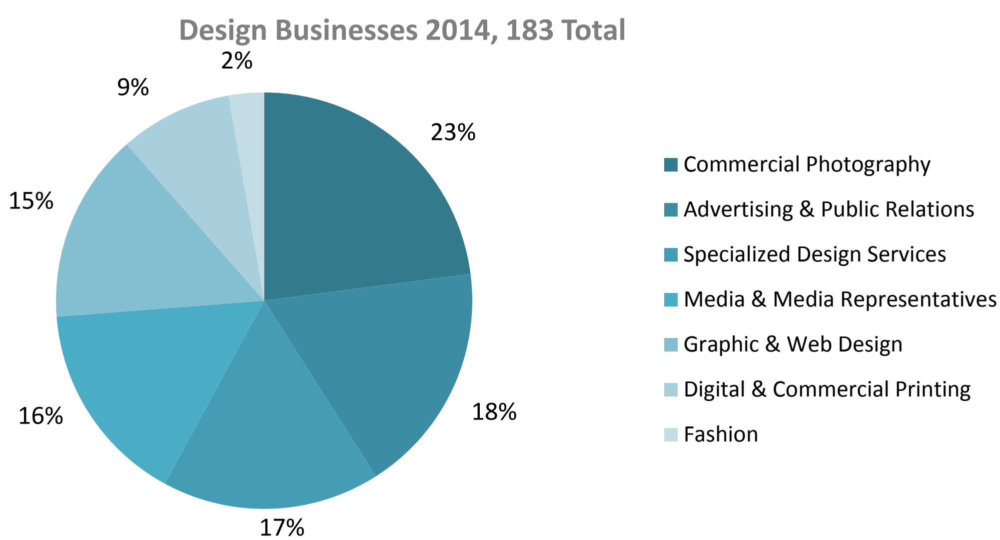
CULINARY

Culinary includes 955 of the following types of locally owned and operated businesses: caterers, cooking schools, food manufacturing, mobile food trucks, restaurants, restaurant management, and specialty food stores. Specialty food stores, such as bakeries, seafood stores, confectionaries, snow ball stands, and coffee shops increased their share of Culinary businesses by 12% since 2010.



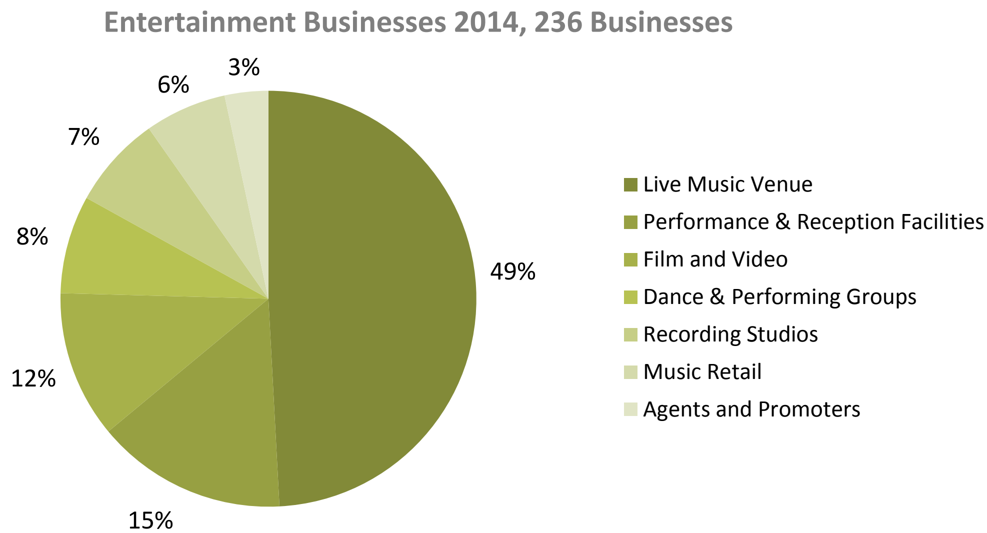
DESIGN

This segment contains 183 of the following types of businesses: advertising, public relations, digital and commercial printing, fashion, graphic and web Design, media and media representatives, commercial photography, and specialized Design services. Design is one of the most diverse segments, with even proportions of the various types of businesses throughout the city.



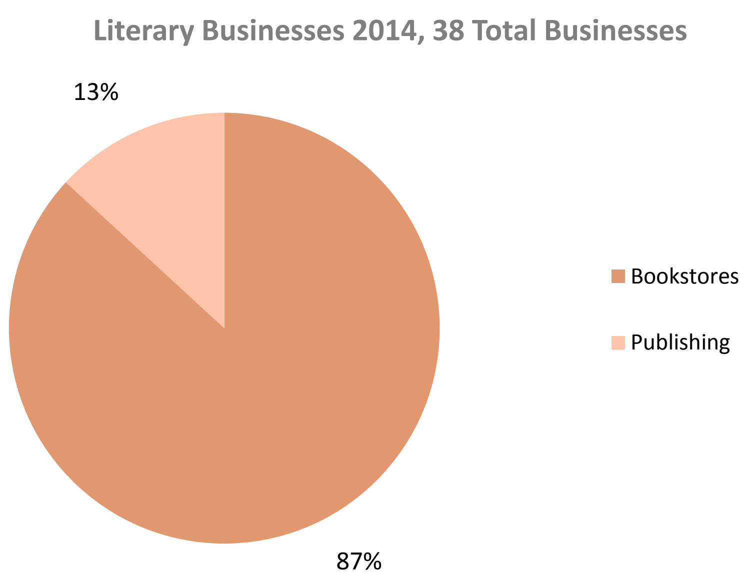
ENTERTAINMENT

The Entertainment segment contains businesses of the following types: music and performing arts venues; film and video; performing groups; recording studios; retailers; and agents.



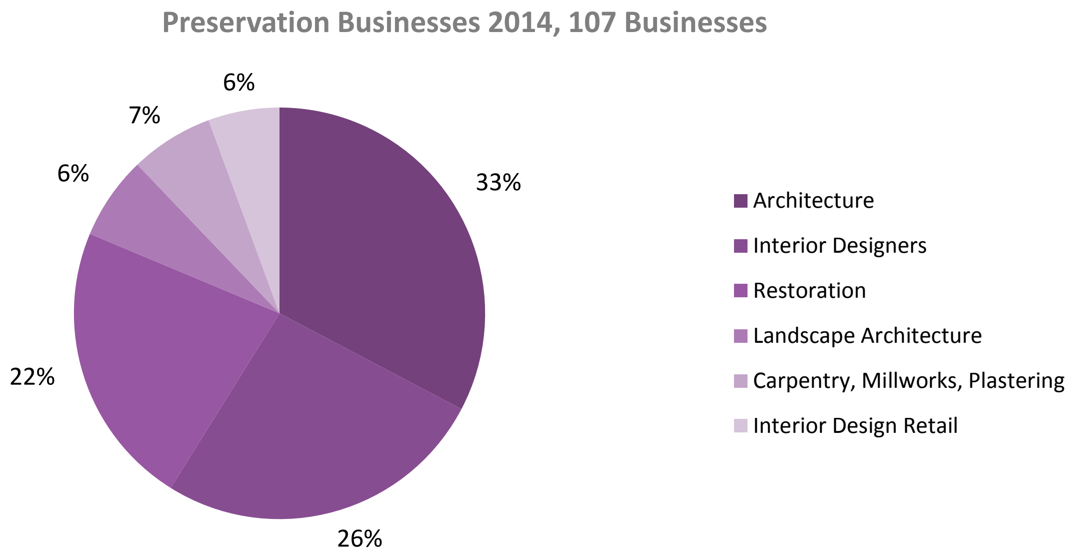
LITERARY

This is the smallest commercial segment including only 38 businesses comprised of presses/publishing businesses and bookstores. Bookstores make up 87% of Literary businesses in the city in 2014, while Publishing has decreased its share by 11%.



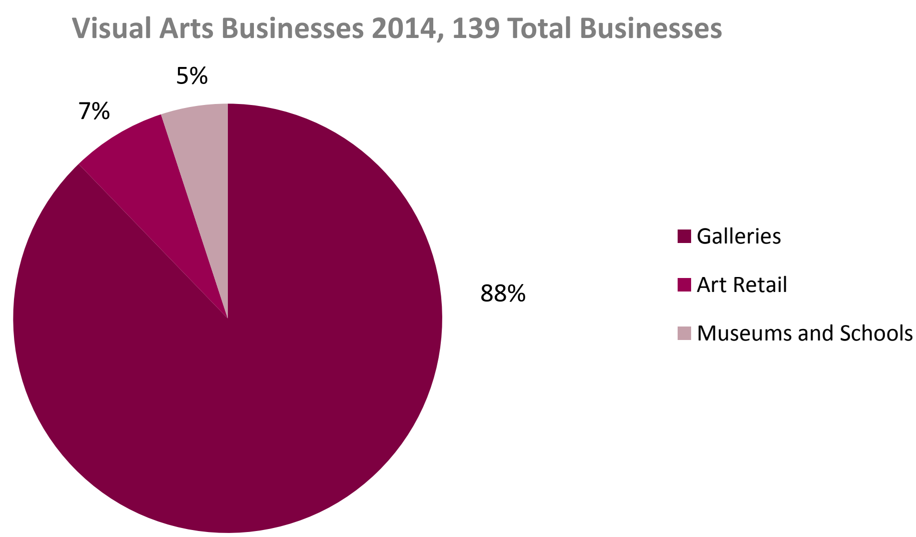
PRESERVATION

Preservation includes a *selection* of architects, interior design retailers, interior designers, landscape architects, restoration contractors and firms, renovation firms, and craftsmen/workshops that specialize in the preservation of the built environment and the restoration of older homes and buildings.



VISUAL ARTS AND CRAFTS

This segment includes 122 galleries, and galleries have increased their share of Visual Arts businesses by 13% since 2010. Art supply and craft product retailers, for-profit museums, and for-profit arts centers and schools are also included.



METHODOLOGY

Cultural businesses were counted from a variety of sources. The Bureau of Revenue and the Geographical Information Systems of the Information Technology and Innovation Department of the City of New Orleans provided the base business list with occupational codes. This list was created by looking for all businesses in the metro area with active accounts.

The Office of Cultural Economy selected those businesses whose occupational codes matched those used by Mt. Auburn Associates, a research firm procured by the Office of Cultural Economy, in the Employment chapter, and conducted primary research to correctly classify those businesses into one of the 6 cultural economy segments and confirmed their status as open businesses currently operating through the use of sales tax data. Next, the Office researched and contacted businesses throughout the city to record newer businesses that may not have been on the original Revenue list and to eliminate national chain stores and restaurants.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

EARNINGS AND WAGES[7]

Overall, cultural workers earned $1.2 billion in 2014, an increase of 2% from 2013 and close to the high point of 2011 ($1.24 billion). As seen in the table below, Culinary and Entertainment employees received the most wages, due to the fact that these two segments have the largest number of employees. The total amount of earnings only decreased in the Design segment between 2013 and 2014. Overall, earnings increased 2% for all cultural economy segments. Literary and Visual Arts had the largest increase in earnings over the year. For all cultural jobs, the average annual salary was $34,853 in 2014, only 6% less than the median household income in New Orleans from 2009-2013.[8]

Overall Earnings

Segment	2011	2012	2013	2014	% Change (2013-14)
Culinary Arts	$406,993,514	$426,689,424	$421,828,844	$441,495,097	5%
Entertainment	$370,021,085	$323,409,961	$332,986,111	$334,364,024	0%
Preservation	$225,811,914	$159,231,464	$215,071,613	$218,121,835	1%
Literary	$66,892,209	$54,642,499	$59,065,837	$90,480,992	53%
Design	$99,034,462	$82,382,856	$110,610,400	$75,906,126	-31%
Visual Arts	$71,663,269	$74,035,848	$30,564,095	$37,918,337	24%
Totals	**$1,240,416,453**	**$1,120,392,052**	**$1,170,126,900**	**$1,198,286,411**	**2%**

Literary and Visual Art jobs experienced high growth in wages in 2014 compared to 2013, returning to averages similar to 2012, when both segments experienced their highest average salaries in the dataset. The Design average salary declined significantly in 2014, below its 2013 high. This decline may be due to the increasingly freelance nature of Design work, lowering the average salary and benefits per job. If Design workers are working multiple jobs, they would have average higher salaries per worker, but this would not be reflected in average salary per job data. However, Design still has the highest average salary for its jobs out of all the segments. Visual and Culinary Arts have the lowest average salaries, reflecting the fact that many artists and food service workers may work multiple jobs that have lower pay, and these average earnings are per job, not per worker.

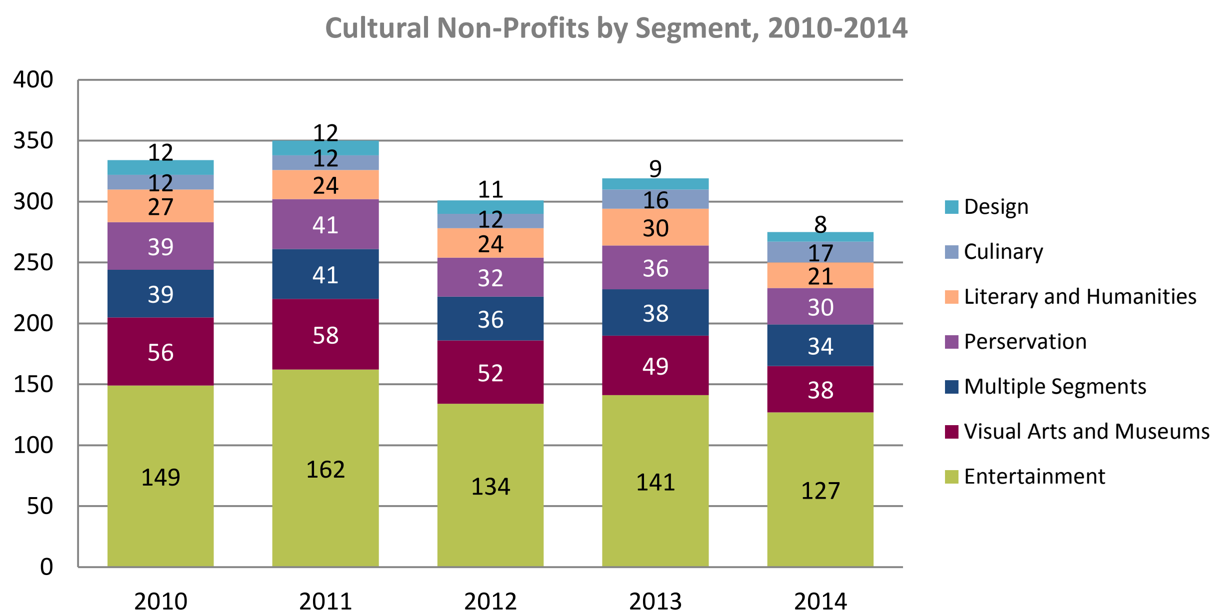
Segment	2012	2013	2014	% Change (2013-14)
Literary	$42,723	$25,465	$42,547	67%
Visual Art	$29,934	$21,962	$27,250	24%
Entertainment	$34,798	$31,870	$32,796	3%
Culinary	$34,154	$30,954	$30,950	0%
Preservation	$40,685	$45,723	$45,154	-1%
Design	$52,187	$64,781	$48,268	-25%

[7] The wage data was researched by Mt. Auburn Associates, commissioned by the Mayor's Office of Cultural Economy.
[8] From the United States Census Bureau, "State & County QuickFacts," available here: http://quickfacts.census.gov/qfd/states/22/22071.html.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

NON-PROFITS

In 2014, 275 cultural non-profit[9] organizations were found using a combination of data sources that focus on culture, the arts, and/or the cultural economy. Compared to 2013, this is a 14% decrease. During 2014, many active organizations either ceased to be active or lost all non-profit status (both state and federal), and were thus excluded from the data.[10]



Entertainment continues to be the predominant segment for cultural non-profits in Orleans Parish (46%); many of these organizations are performing groups, Carnival krewes, and social aid and pleasure clubs. Visual Arts and Museums remains in second place with 14% of non-profits. The Multiple Segments designation represents the 12% of cultural organizations that devote themselves, and almost all their programming, to two or more cultural economy segments. Examples include the Arts Council of New Orleans, the Contemporary Arts Center, and the New Orleans Center for the Creative Arts. The Literary and Humanities segment includes the Louisiana Endowment for the Humanities, headquartered in the city, and historical and literary societies that collect or preserve literature or other historical traditions, items, sites, or archives. The Design organizations are those focused on media, graphic design, fashion, or communications and have the smallest share of organizations overall at 3%.

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[9] Either 501(c)(3) or registered non-profit with the state of Louisiana

[10] This does not necessarily mean that these organizations have ceased to be active in the community, but they have lost their legal standing as non-profits.

OVERALL FINANCIALS OF CULTURAL NON-PROFITS IN 2013[11]

As in previous *Snapshots*, the revenue and assets of cultural non-profits were examined by segment to get a rough picture of cultural non-profit activity in New Orleans in 2012 and any significant changes from 2010.[12] Overall, there was a 30% increase in revenue between 2010 and 2012.[13] Several organizations in the Multiple segment doubled their revenue over the three year period. The Culinary segment gained four organizations and older organizations greatly increased their revenues.

Visual Arts and Museums receive the most revenue of all segments, primarily from admissions, grants, and contributions. While there are more Entertainment-oriented organizations, they do not have as large of a revenue stream as museums, art schools, art centers, and other institutions included in the Visual Arts category.

Revenue by Segment

Year	2010	2011	2012	2013	% Change 2010-2012
Segment	Total Revenue				
Culinary	$5,276,541	$8,868,966	$9,025,685	$9,391,049	71%
Design	$6,276,536	$6,105,428	$6,918,289	$5,434,050	10%
Entertainment	$66,077,157	$73,706,987	$76,674,379	$73,150,917	16%
Literary and Humanities	$8,917,574	$9,134,865	$9,550,649	$8,366,157	7%
Multiple Segments	$17,689,566	$19,708,701	$32,746,839	$22,897,325	85%
Preservation	$15,292,878	$15,603,875	$15,572,922	$14,288,361	2%
Visual Arts and Museums	$91,133,233	$103,379,670	$105,031,712	$58,556,659	15%
Totals	**$210,663,485**	**$236,508,492**	**$255,520,475**	**$192,084,518**	
Medians	**$15,292,878**	**$15,603,875**	**$15,572,922**	**$14,288,361**	**30%**
Averages	**$30,094,784**	**$33,786,927**	**$36,502,925**	**$27,440,645**	

The Visual Arts and Museums category still had the majority of assets (48%) in 2012. Museums have significantly more assets than other organizations, including buildings and collections. Multiple segment organizations are second with 24% of assets. This segment also includes organizations that run art centers that have spaces and programming across segments. Entertainment, with 11% of assets, is mostly made of performing groups and festival producing organizations, neither of which invest in physical assets to the extent that Visual Arts and Museums do. Culinary has comparatively few assets to the other segments, but this is because most of its programs take place in temporary spaces and

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[11] Data comes from: GuideStar USA™ and primary research by the Mayor's Office of Cultural Economy. Organizations in GuideStar that were determined to be inactive during 2013 were not included. Previous years' data was updated for missing financial information.

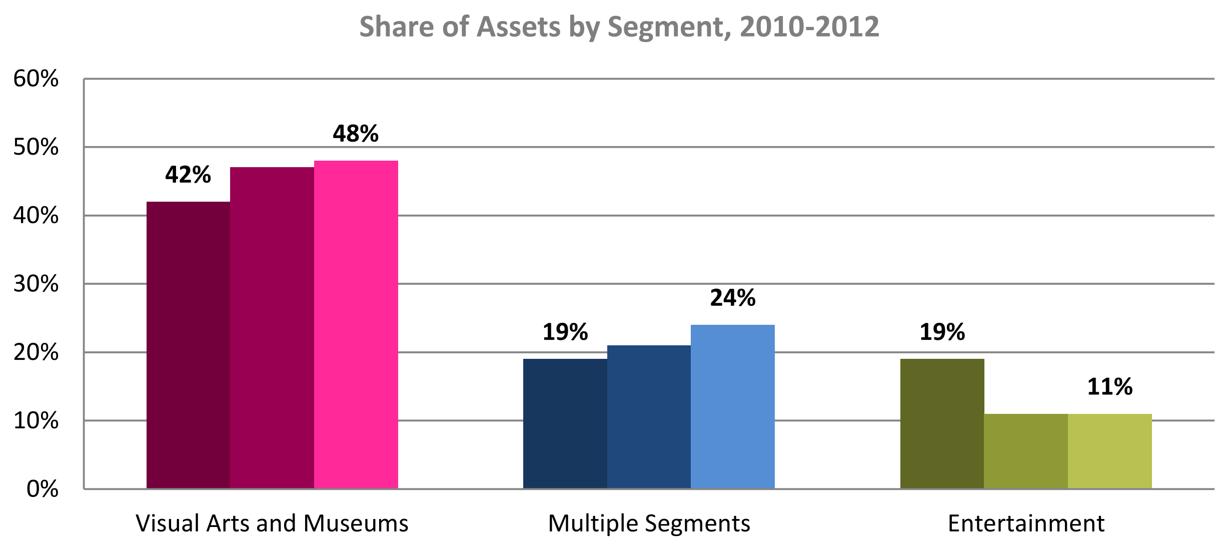
[12] 990 tax forms for 2013 were examined for 164 of the 241 501c3 non-profits or 68%, as these were all that had available 2013 forms. 73 of the 241 organizations were in good standing with the IRS, but did not yet have a 2013 990 available. 5 organizations, while still active in 2013, have had their status revoked by the IRS for failure to file a 990 over the past 3 or more years.

[13] 2012 is the comparison year for this Snapshot because too many large organizations did not have 2013 990s available at the time of this study. The 2015 Snapshot will have more complete 2013 financial data to make this comparison meaningful.

outdoors, or consist of funding for scholarships or training, eschewing the need for permanent facilities and equipment.

Assets by Segment

Year	2010	2011	2012	2013	% Change
Segment	Total Assets				2010-2012
Culinary	$8,071,252	$9,675,256	$11,112,734	$7,878,299	38%
Design	$4,093,332	$3,033,071	$3,079,209	$2,608,459	-25%
Entertainment	$64,731,979	$59,616,489	$62,201,802	$48,476,446	-4%
Literary and Humanities	$33,677,299	$51,509,706	$29,339,070	$26,684,019	-13%
Multiple Segments	$120,336,017	$116,552,353	$128,498,498	$114,079,990	7%
Preservation	$50,587,469	$49,838,612	$49,761,731	$27,137,171	-2%
Visual Arts and Museums	$258,313,031	$257,961,664	$258,476,216	$184,715,535	0%
Totals	**$539,810,379**	**$548,187,151**	**$542,469,260**	**$411,579,919**	**0%**
Medians	**$50,587,469**	**$51,509,706**	**$49,761,731**	**$27,137,171**	
Averages	**$77,115,768**	**$78,312,450**	**$77,495,609**	**$58,797,131**	



PRESERVING THE PAST, FOSTERING THE FUTURE

Founded in 1961, Preservation Hall has literally been preserving living musical history. Older generations of musicians train younger musicians, who then continue to pass on New Orleans' Traditional Jazz. The non-profit also has an extensive archive featuring instruments, documents, and recordings. Most importantly, Preservation Hall presents live Traditional New Orleans Jazz every night to audiences from around the world from its famous French Quarter venue. Since 2005, the organization has prioritized three areas in order ensure this musical tradition continues: education of youth in New Orleans; outreach to the nation and world; and enhancing its archive.

In 2007, the city was still struggling with recovery, particularly in maintaining musical education for students. Derrick Tabb and Allison Reinhardt founded the Roots of Music to engage young people in the marching band traditions of New Orleans. Roots of Music is more than just a marching band; it is musical education, a mentorship program, an academic tutoring resource, and an access point for low-income students for arts education and free meals 5 days a week. This holistic view of the marching band ensemble as part of the educational and social fabric of children's lives is what makes Roots of Music so successful. In 2013, the band marched in the Rose Bowl parade and was featured in the documentary film, *The Whole Gritty City*.

2014 NEW ORLEANS CULTURAL NON-PROFIT SURVEY

The Office of Cultural Economy sent a survey to 102 cultural non-profits across all seven segments to gain more in-depth knowledge of local economic impact of non-profit activities, available programming, and more. A diverse selection of organizations responded to the survey (24% of organizations). Fifty-two percent of organizations were under 20 years of age, one organization was over 100 years old. Similarly, both large and small organizations were surveyed as based on their employees (0-100) and on their payroll (up to $3.3 million) and local expenditures (up to $4 million).

Cultural Non-Profits Survey Summary

Cultural Economy Segment						
Visual Art & Museums	Entertainment	Culinary	Design	Preservation	Literary & Humanities	Multiple
20%	44%	8%	4%	4%	8%	12%

Age		Public Served	
		Total	882,012 people
Average	22 years	**Average**	46,422 people
Median	19 years	**Median**	9,000 people
Range	2-108 years	**Range**	7-500,000 people

	Employees	Payroll	Local Expenditures
Total	396 employees	$10,352,265	$7,649,643
Average	18 employees	$450,098	$402,603
Median	6 employees	$101,000	$150,000
Range	0-100 employees	$1,500-$3.3 million	$80-$4 million

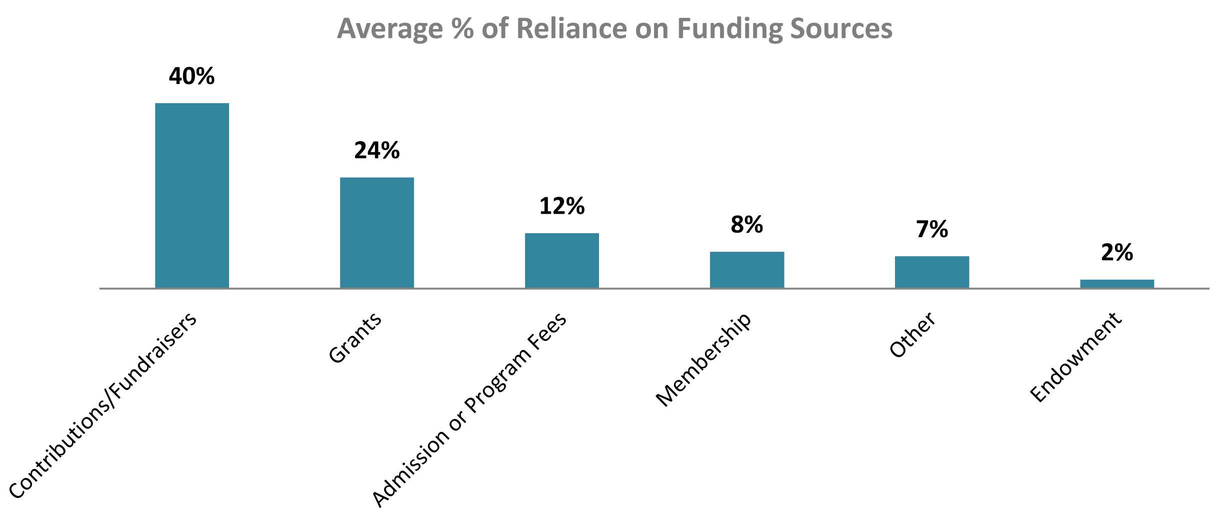
THE ECONOMIC IMPACT OF LOCAL CULTURAL NON-PROFITS

The sampled cultural non-profits spent $7.6 million in the city in 2014. Median local expenditure was $150,000. Expenditures of cultural non-profits include local contractors for a variety of services, such as construction, management, information technology, arts instruction and more. It also includes any goods purchased in the city, rental of facilities, utilities, etc. All of these dollars infuse our local economy, contributing to the payroll of local businesses, local government through sales taxes, and in turn allowing for more spending in the local economy.

Surveyed organizations paid over $3.3 million to 396 employees in 2014. Most cultural non-profits have a modest payroll (median $101,000), employing only one or two full-time workers. Many cultural non-profits in the city are volunteer driven and the majority of these are small organizations that have no paid employees. However, this does not mean that the contribution of non-profits to employment in the city is insignificant. Most likely, 4,000-6,000 people are employed by cultural non-profits in the city when extrapolating from these results. Many more non-profit organizations that are not cultural most likely employ significant numbers.

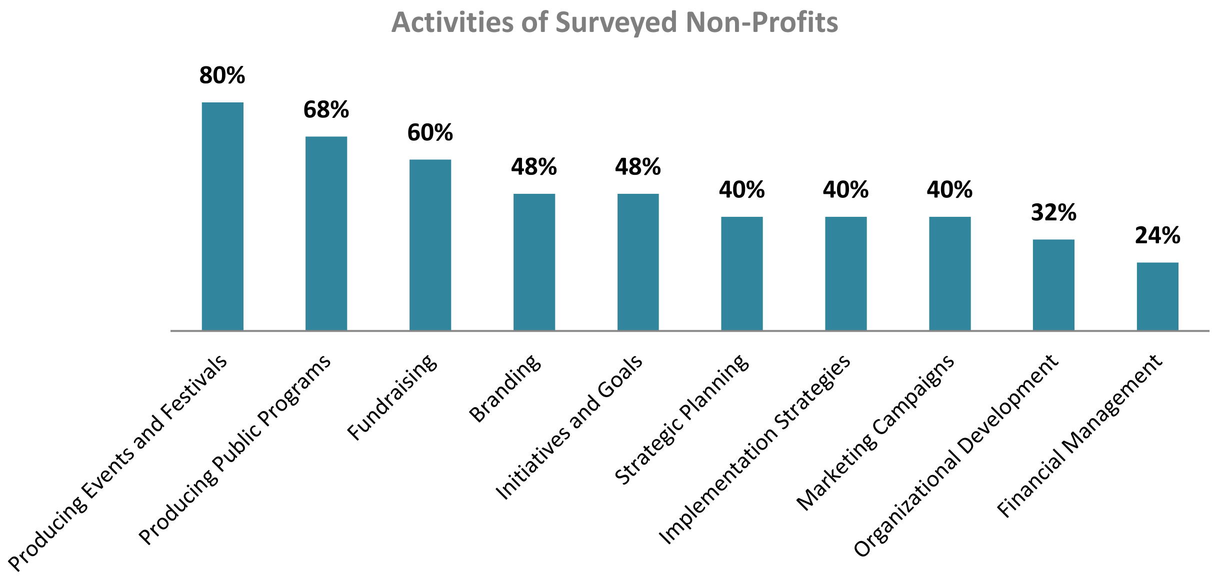
FUNDING SOURCES FOR CULTURAL NON-PROFITS

Survey participants indicated five major revenue sources: grants, admission or program fees, contributions or fundraisers, membership fees, and endowments. Contributions and fundraisers were the most significant source of revenue; on average, 40% of funding was received from contributions. Unusually, grants accounted for a significantly smaller proportion of funding (24%) compared to contributions, whereas past surveys have shown that grants are a much more important part of funding. This is likely due to the little overlap between survey respondents from year to year, and the characteristics of these organizations. Endowments were the rarest funding source. On average, only 2% of funding came from endowments and only 12% of surveyed organizations had access to an endowment.



PROGRAMMING

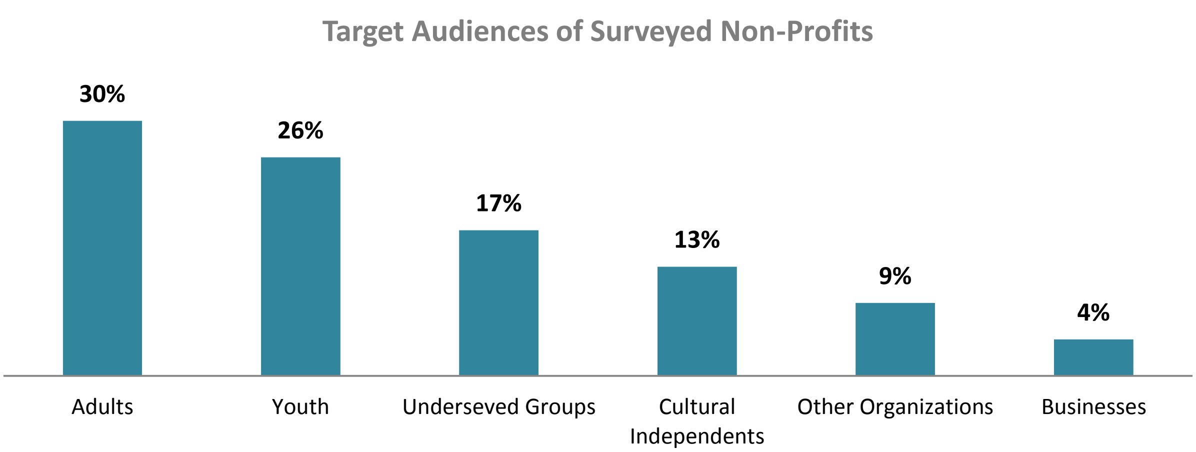
Of the surveyed non-profits, the majority coordinates and produces events and/or festivals (80%) and programming for the public (68%). Most of these programs serve the community through education, creation of art, social services or community engagement. Programming is usually the central mission of most cultural non-profits that are not festivals/event-focused. There are organizations that only exist to produce an annual event or festival. Some, like Social Aid and Pleasure Clubs, produce an annual parade, but also perform year-round services for their members. The majority do a significant number of other activities besides programs, events, or festivals.



Not surprisingly, over half (60%) of organizations work on fundraising (either through events, campaigns, outreach, etc.), reflecting its importance as a major source of revenue. Fundraising is a major revenue source (over 50% of total revenue) for 36% of the respondents and averages 78% of their overall funding.

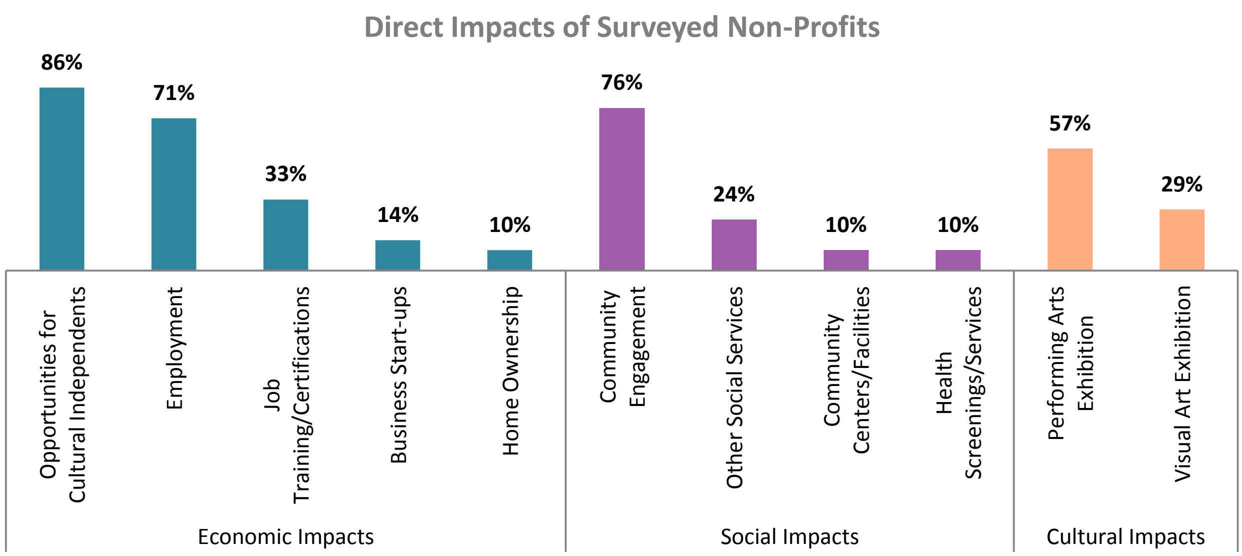
Thirty-two percent engage in Organizational Development, which is a planned effort to increase the non-profit's capacity, effectiveness, and/or viability. Initiatives and Goals (48% of work) is a planning process that leads to Strategic Planning (40%) and Implementation Strategies (40%). The strongest organizations engage in all three of these activities; 28% of respondents engaged in all three in 2014, compared to only 12% in 2012.

Programming should have an impact on the audience it serves and the members of the organization. To measure this impact, an important first step is to identify these groups. Of the surveyed organizations, 30% primarily served adults through their programs. The second most identified target groups were youth (26%) and underserved populations (17%).



The surveyed non-profits chose from eleven possible impacts of their programming in 2014. Fifty-six (86%) reported creating opportunities for Cultural Independents. These include gigs for musicians, providing venues for sales of art work or crafts, career fairs or networking, and other activities that have the potential to create income and/or employment opportunities for cultural producers and workers. Employment is when an organization directly facilitates or employs a target audience. Seventy-one percent of surveyed groups had direct employment impacts. Seventy-six percent reported community engagement as a primary impact of their work. Engagement brings people and groups together, perhaps providing unique opportunities for these groups to interact. It also creates ties between individuals and groups in the community, strengthening it. Finally, engagement starts a dialogue that can create a shared vision and goals for that community for its benefit. These goals can be cultural, economic, social, or all three.

Other economic impacts included 33% conducting job training and/or certifications, and 14% assisting entrepreneurs with business start-up. Other social impacts included social services such as financial counseling, housing assistance, legal counsel, etc. (24%). Cultural impacts included exhibitions (also festivals or events) that involved the performing (57%) or visual arts (29%).



SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

FILM AND VIDEO

OVERVIEW OF FILM INCENTIVES AND FILM NEW ORLEANS

Film New Orleans (FNO) is the primary liaison between film and television productions and the City of New Orleans. FNO is responsible for marketing and attracting film and television related business for the purpose of economic development, for assisting productions with the permitting process and in connecting with local Crew and Resources, and for facilitating good communication between productions and the local community to strike a balance between film activity and quality of life.[14]

The city hosted 55 total feature film and television tax credit projects (each with local expenditures over $300,000) in 2014.[15] Local expenditures for these projects are estimated at $514 million for the New Orleans Region.[16] There were an estimated 193 smaller, non- tax credit projects for 2014 (with local expenditures under $300,000 each). These projects range from student films and independent films to commercials and major network news and sports broadcasts.

The state of Louisiana, through Louisiana Economic Development, offers a 30% transferable incentive for total in-state expenditures related to the production of a motion picture. An additional 5% labor incentive can be earned on the payroll of Louisiana residents that are employed by a state certified motion picture production. The incentives are fully transferable and Louisiana has no limit to the amount of incentives that can be earned by a single production. Only money spent on the production costs within the borders of the state of Louisiana will qualify for the 30% incentive. That includes all services that are performed in Louisiana from residents and non-residents alike. Productions have the option to transfer credits (incentives) to the state for $0.85 on the dollar.[17]

Louisiana and New Orleans, in particular, have become major players in the film industry. Of 108 live action films released by major United States studios in 2013, Louisiana ranked first as a primary location with 18 movies. California and Canada ranked second with 15 movies each. These 108 movies had production budgets of $71 million on average, and represent the year's top 50 grossing films.[18]

In 2014, these major productions included the latest in the *Terminator* and *Jurassic Park* franchises, the groundbreaking series *American Horror Story*, and *NCIS: New Orleans*, a rising ratings hit in the 2014-2015 season, and filmed entirely within the city and surrounding areas. New Orleans has become known for its recent blockbuster, independent, and critically acclaimed productions, including *Dawn of the Planet of the Apes, True Detective, Treme, Beasts of the Southern Wild,* and *Django Unchained*.

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14 From Film New Orleans website: http://www.filmneworleans.org/

15 Number of productions each year is calculated by counting the number of productions that start filming in the city during the year.

16 Local expenditures each year is calculated by adding the local expenditures reported to the State by productions that complete filming in New Orleans during the year.

17 From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.php/film/why-shoot-here/incentives/

18 From *2013 Feature Film Production Report*, by FilmL.A., Inc.

Major Film Projects 2014

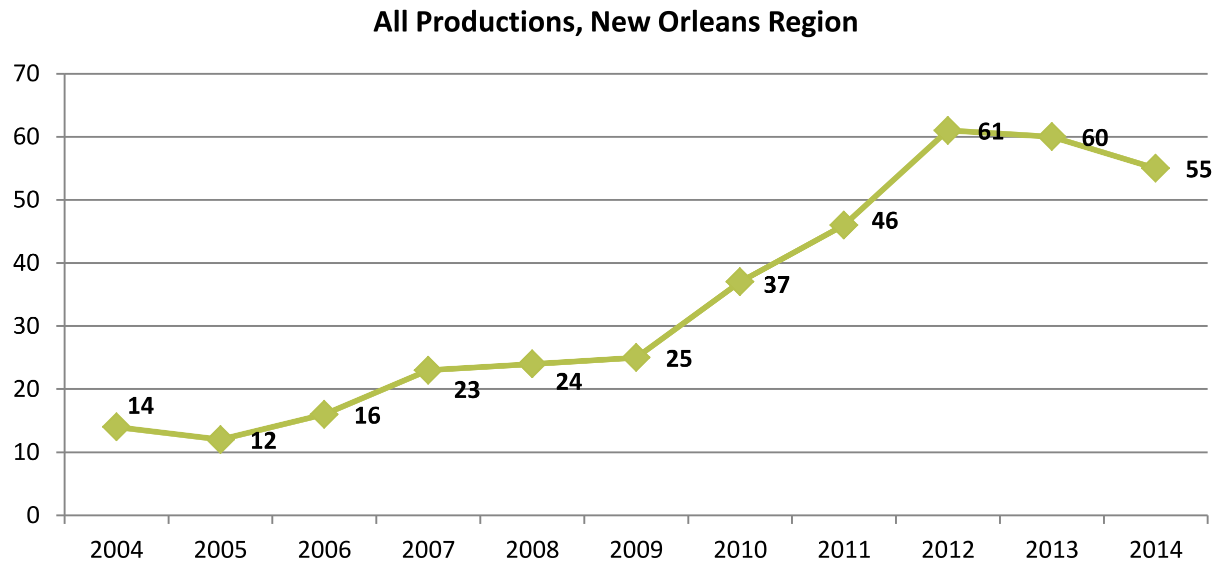
Project	Production Type
Terminator: Genesis	Film
Jurassic World	Film
American Horror Story: Freak Show	TV Series
Get Hard	Film
Hot Pursuit	Film
American Ultra	Film
Best of Me	Film
Midnight Special	Film
Kidnap	Film
Trumbo	Film
Our Brand is Crisis	Film
Man Down	Film
Mr. Right	Film
The Whole Truth	Film
Valencia	Film
The Magicians	TV Pilot
Mississippi Grind	Film
Pitbulls & Parolees Season 6	TV Series
Mind Puppets	Film
Opposite Worlds	TV Series
Adam Divine's House Party	TV Special
D-Train	Film
NCIS: New Orleans	TV Pilot
Kickboxer	Film
Black Ink: New Orleans	TV Series
Toyota Camry Commercial	Commercial
Cat Run 2	Film
Banshee	TV Episode

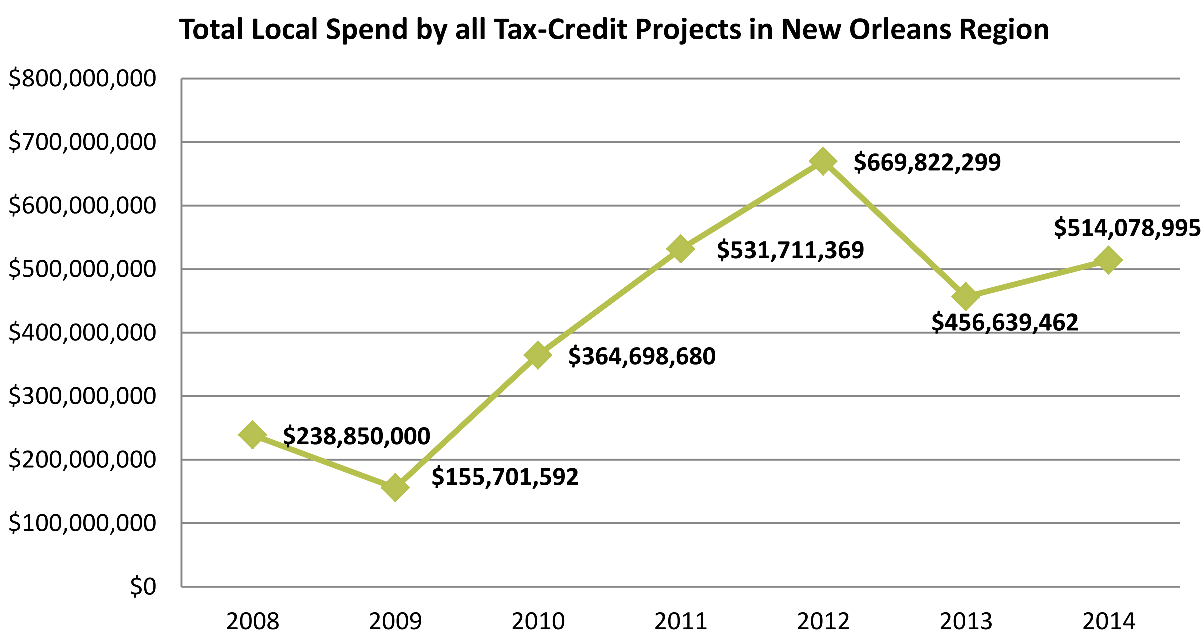
Project	Production Type
Nightwatch	TV Series
Jimmy Dean Commercial	Commercial
Joe Dirt 2	Film
Tostitos "Hungry Man" Super Bowl	Commercial
Sticky Notes	Film
Saints & Sinners	TV Series
The American Project	Film
Kevin Guaranteed	Film
Turbo Tax Commercial	Commercial
NOLA Circus	Film
Adam Jones	Film
Lady Day at the Emerson Bar and Grill	MOW
Kraft Foods	Commercial
Popeyes Commercial	Commercial
Inside the NBA on TNT	TV Series
Can Am Spyder w Drew Brees	Commercial
Saints & Sinners	TV Pilot
Indiscretion	Film
Cajun Legend Hunters	TV Episode
Swamp Monsters	TV Episode
NTT	Commercial
The Originals	TV Episode
Berkshire Hathaway Home Services	Commercial
Fix It & Finish It	TV Episode
Best in Chow	TV Episode
The Runner	Film
Crone aka "Abattoir"	Film

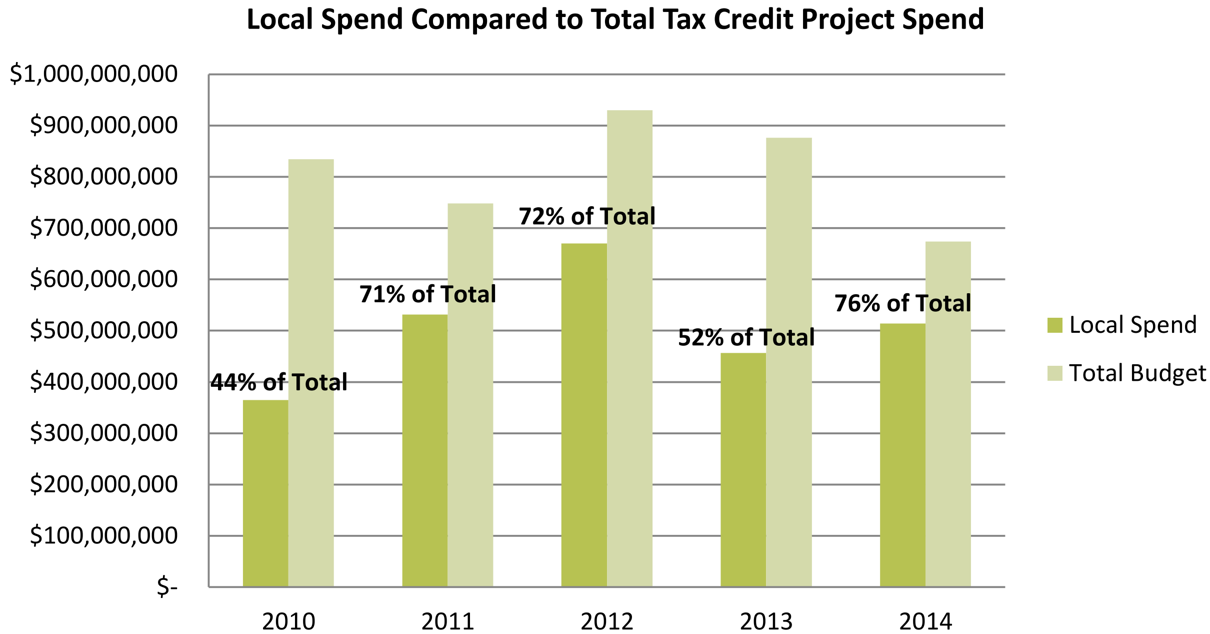
OVERALL FILM ACTIVITY

Since the introduction of the tax credits in 2002, New Orleans has seen steady growth in film and video productions spending over $300,000 in state. Although Hurricane Katrina in 2005 caused a low point of 12 productions, the numbers have been steadily rising. The city also is home to several TV series, including *NCIS: New Orleans, American Horror Story,* and more. Television series and larger productions provide constant exposure for our unique locations and culture, use local businesses and services on a regular basis, contribute to our economy, and employ local crew.

Productions have also spent more locally, peaking at $670 million in 2012, when a large number of feature projects such as *The Butler* and *Ender's Game* were filmed in the city. As large productions and television series continue to locate in the city, the local expenditure has continued to increase back towards that high peak. On average, productions have spent 63% of their total budgets locally over the last 5 years, and in 2014, 76% of the total budget was spend locally, an all-time high. The film industry has been, and is continuing to make a large investment in local labor, goods, and services.







FILM WORKERS AND WORKFORCE DEVELOPMENT

Since the advent of tax incentive programs for the film industry in Louisiana in 2003, the number of workers in the film industry has significantly increased. Most work is project based and therefore difficult to measure through traditional data sources. The Employment chapter examined Entertainment jobs, which is not necessarily the same as workers since many workers in the industry may work 2 or 3 of these jobs/projects in a single year. When looking at only Film and Video jobs, there were an estimated 1,878[19] jobs in the film and motion picture-related categories. In order to get a rough estimate of film workers in the region, it is necessary to look at listings from the *2013-2014 Louisiana Entertainment Sourcebook*. Including actors, there are approximately 1,267 film workers in the New Orleans region in 2014, an increase of 15% over the 1,103 workers counted in 2012.

The Mayor's Office of Cultural Economy partners with local organizations to produce low-cost or no-cost film industry workforce training programs for individuals interested in working in New Orleans growing film industry. In 2014, the City partnered with local film industry businesses and New Orleans Video Access Center (NOVAC) to produce workforce training programs which trained a total of 187 individuals from the New Orleans region for jobs in the film industry.

Our Ready, Set Film! Program includes the following training programs: Intro to Grip and Electric; Practical Effects; Film Production Accounting; Assistant Directing; Loop Intensive; and Production Assistant Bootcamp. For all trainings, the City partners with local and national film industry businesses and practicing professionals to provide hands-on training to program participants. For example, the Loop Walla Intensive allowed professionals from a local audio post company, Apex Post, to train 10 actors in looping techniques which is the process of fitting speech to previously shot film. Apex Posts' industry credits include *12 Years a Slave*, *Olympus Has Fallen* and *Elysium*. Production Assistant

[19] Source: ESMI, includes Actors, Producers and Directors, Camera Operators, Film and Video Editors, Media and Communication Equipment Workers, Costume Attendants, and Makeup Artists.

Bootcamp was lead by instructors from Quixiote, a national grip and electric company and a (local) film studio operator renowned for providing film training across the country. Production Accounting and Assisting Directing Intensive classes were both supported by Entertainment Partners, who provided the licensing for MovieMagic software, the leading accounting and scheduling program for film industry professionals.

Estimated Film Workers in New Orleans Region, 2014

Art	**27 workers**	**Sets/Wardrobe**	**497 workers**
Art Directors		Art Department	
Art Designers		Boom Operators	
Title Artists		Buyers	
Set Designers		Construction	
Model Makers		Craft Services	
Camera/Visual/PR	**184 workers**	Electric	
Camera		First Aid	
Directors of Photography		Greens	
Camera Operators		Grips	
Visual Effects Supervisors		Locations	
Still Photographers		Paint/Scenic	
Publicists		Projection	
Special Effects & Stunts		Props	
Directors/Production/Managers	**189 workers**	Set Dressing	
Directors		Sound	
Assistant Directors		Video Assist	
Unit Productions Managers		Wardrobe	
Technical Coordinators		**Supervisors/HR**	**53 workers**
Location Managers		Script Supervisors	
Location Scouts		Production Accountants/Payroll	
Producers &Production Assistants		Production Office Coordinators	
Editors	**24 workers**	**Talent/Casting**	**30 workers**
Make-up and Hair	**64 workers**	**Transportation and Freight**	**59 workers**
Screenwriters & Composers	**28 workers**	**Actors**	**112 workers est.**
TOTAL EST. FILM WORKERS IN NEW ORLEANS REGION: 1,267 workers			

Many trainees have gone on to apply for and be awarded membership in the numerous local chapters of the International Alliance of Theatrical Stage Employee Unions (IATSE) including IATSE 478, 600, 800 and 798 as well as The Screen Actor's Guild. Trainees are also given job placement support and a year-long NOVAC membership following their completion of the program. Job placement efforts include providing local and incoming film productions with a digital "Louisiana Crew Directory" that includes the names, contact information and credits of our graduates, referring trainees to these production companies, maintaining a list of all trainees for referral purposes, hosting the "Louisiana Crew Directory" on our website for download and working with local productions to provide internship opportunities on film sets to the trainees. NOVAC also provides all trainees with production listings and monthly job opportunities.

Finally, these workforce training programs allowed participants to access jobs in the film industry, having learned basic vocabulary and set etiquette. OSHA training allowed participants already working in the film industry to gain certification and specific technical skills that they could add to resumes to improve their employability. Our Production Assistant Bootcamp trainees are consistently hired in production jobs as they are available.

SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

SOUND RECORDING

OVERVIEW OF LOUISIANA SOUND RECORDING INCENTIVES

The Sound Recording Investor Tax Credit was created with the Entertainment industry in mind. Much like Louisiana's highly successful film program, the sound recording incentive is designed to boost production in the state by reducing the cost of making new master music recordings whether distributed as a CD, a digital download, or part of the score or soundtrack of a film, commercial or videogame. The state offers a 25% refundable tax credit for local investments in sound recording and recorded music production projects.

Examples of eligible local expenses are:

- Studio rental and recording media (tape, CDs, hard drive);
- Engineer and session player fees;
- Hotels, meals and catering. [20]

SOUND RECORDING IN NEW ORLEANS

The cultural businesses research conducted by the Mayor's Office of Cultural Economy in 2014 found 17 commercially active recording studios. Many home recording studios and smaller, informal studios exist in the city but are difficult to track using traditional economic data.

As can been seen in the accompanying graphs, New Orleans is home to at least 50% of sound recording projects that qualify and apply for the Louisiana Sound Recoring Tax Credits since 2009.[21] The city has averaged 64% of projects since 2008. Sound Recording projects have spent a total of $2.4 million since 2008 locally, and provided 1,200 jobs. New Orleans has averaged 74% of all the jobs generated in the state each year, and 59% of all local expenditures.

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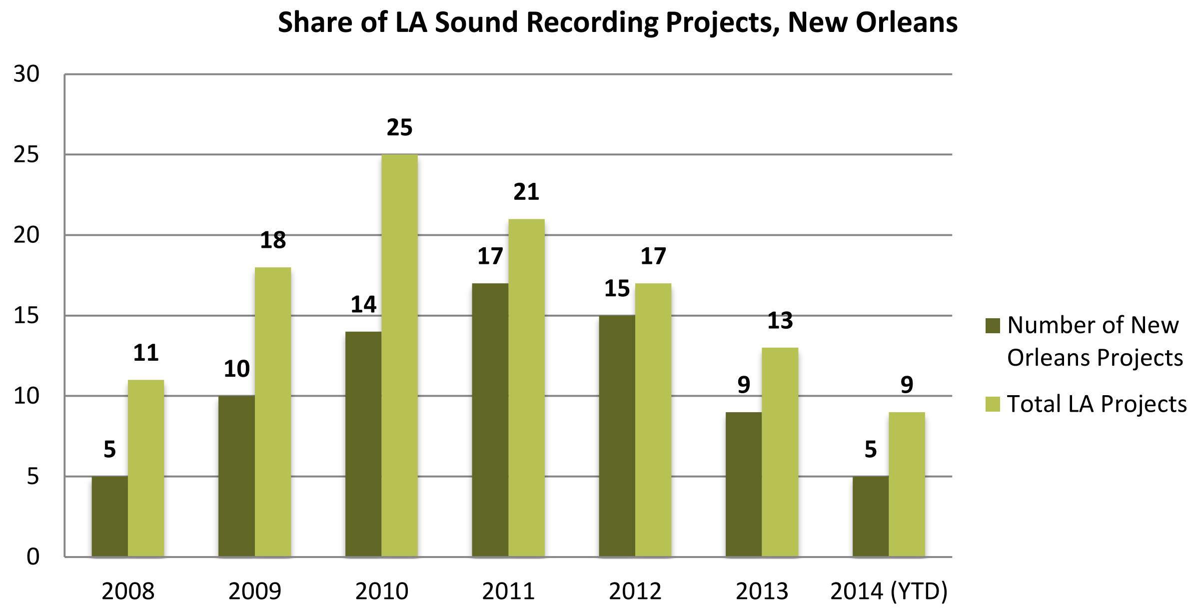
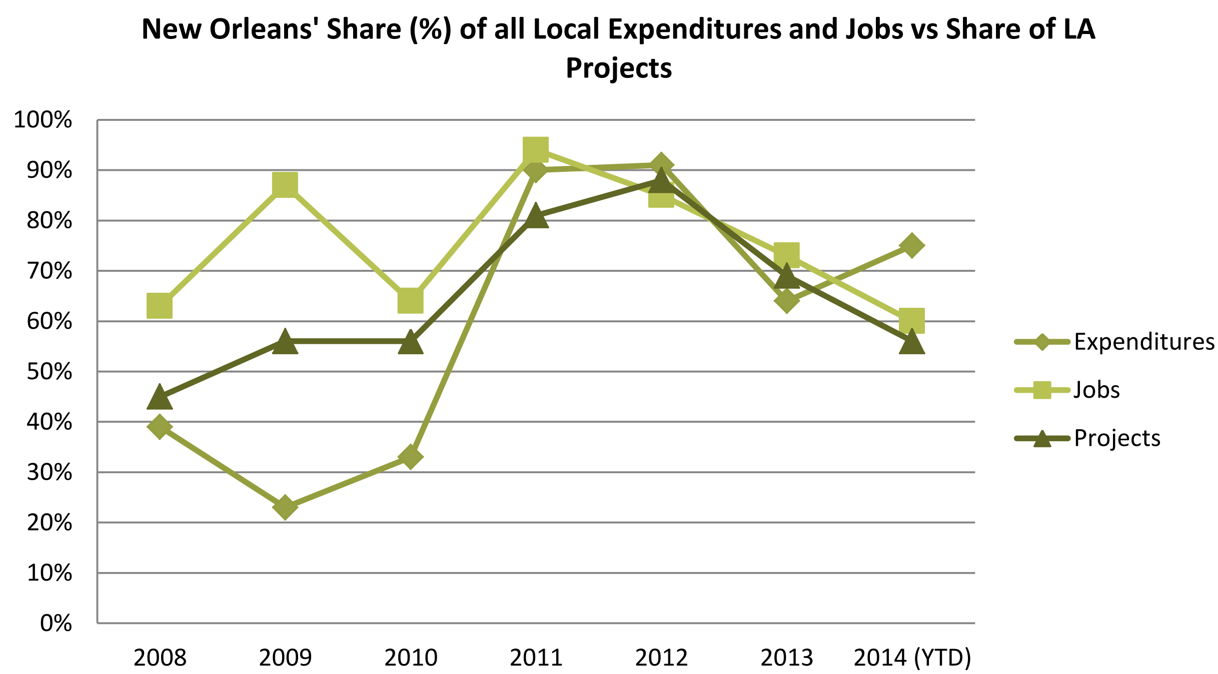
[20] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index

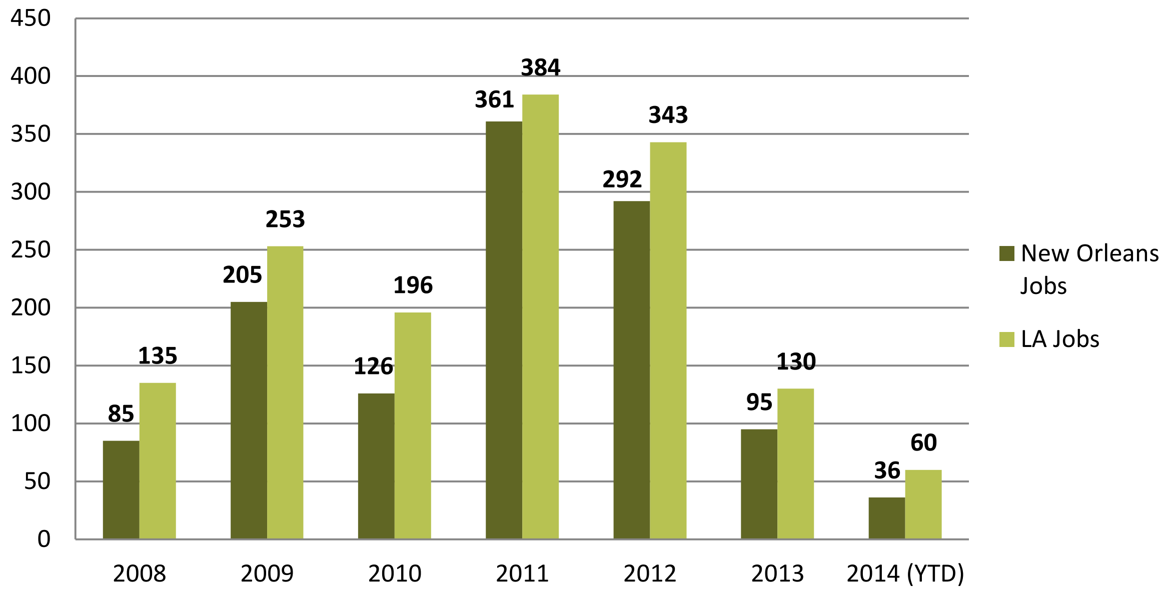
[21] For this survey, only projects that had been certified and have had credits paid out to applicants by the state were counted. Numbers from previous *Snapshots* were adjusted to these new parameters. Only those projects that could be reasonably found to have been done in the Orleans Parish borders were included.



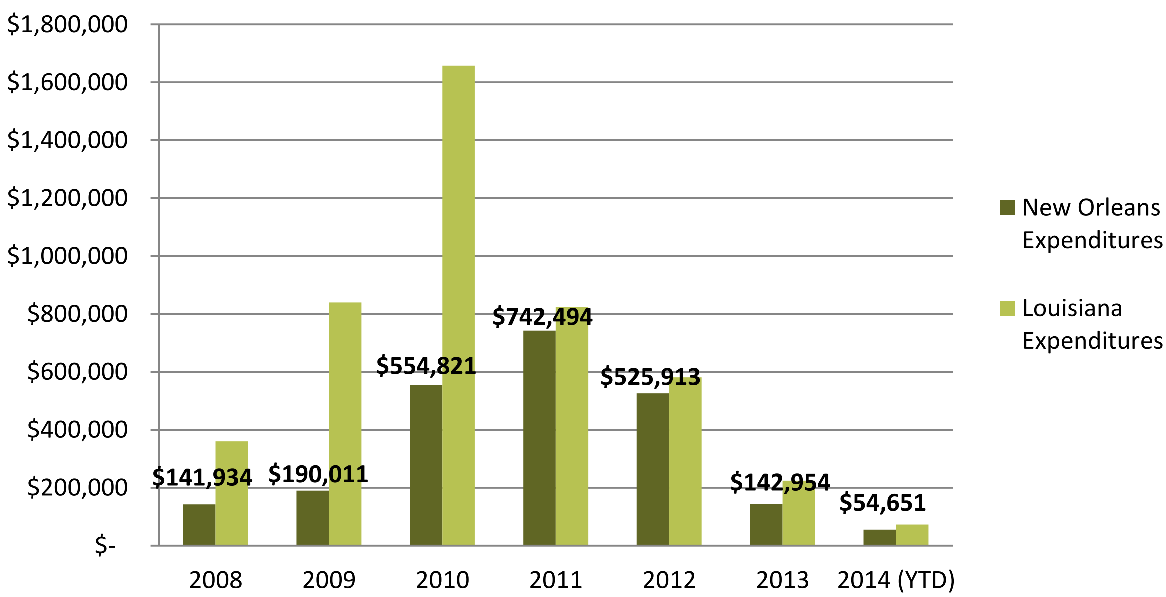
The figure below demonstrates the descrepencies between the percentage of projects versus the percentages of jobs and local expenditure. New Orleans is netting a high percentage of projects and an even higher percentage of jobs compared to the rest of Louisiana, but its share of local spending lags behind until 2011. From 2008-2010, projects in New Orleans provided more jobs, but for much less local expenditure, meaning that these jobs most likely did not pay as highly as those for projects outside of Orleans Parish. 2011 turns around this trend, and from 2012-2014, expenditures track much more closely with projects and jobs.



Tax Credit Project Sound Recording Jobs, New Orleans



Sound Recording Local Expenditures, New Orleans



SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

LIVE THEATRICAL AND DANCE PERFORMANCES AND INFRASTRUCTURE

LIVE THEATRICAL PERFORMANCE IN NEW ORLEANS

New Orleans has a strong live performance infrastructure with 20 venues.[22] These include the Mahalia Jackson Performing Arts Center, the Saenger Theater, small neighborhood theatres in Uptown, Le Petit Theatre, and the Shadowbox Theatre, and performance facilities at local universities and the New Orleans Center for the Creative Arts.

These venues play host to productions from all over the country as well as our local performing groups. The cultural business and non-profit research captured 36 active performing groups in theatre, comedy, music and dance in 2014.[23] These groups perform in local venues such as La Nuit Theatre uptown, Joy Theater, Ashé Cultural Center, local universities, and in the Warehouse District's Contemporary Arts Center and larger venues such as the Joy Theatre or the Mahalia Jackson Center for the Performing Arts.

In 2014, a selection of local performing groups and venues were surveyed allowing us to look at small community theaters to better capture the full spectrum of live theatrical and dance activity in the city.

Local Performing Group & Venues Survey Results

Year	Productions	Performances	Employees	Attendance	Ticket Sales	Payroll	Local Expenditure
2012	99	276	645	24,525	$288,100	$290,755	$267,500
2013	115	386	1,128	41,265	$601,310	$1,125,190	$785,000
2014	147	389	476	22,000	$465,000	$547,000	$407,000

OVERVIEW OF LOUISIANA LIVE PERFORMANCE PRODUCTION INCENTIVES

The Live Performance Production Incentives allow up to a 25% transferable tax credit for investments made in theatrical and concert productions. An additional 10% tax credit for payroll expenditures to Louisiana residents is also available. A transferable tax credit can be sold or applied against Louisiana tax liability. Tax credits may be earned on a single production for a period of 2 years or a series of productions which take place over a 12-month period. To qualify for the Live Performance Tax Credits, applicants must spend a minimum of $100,000 in Louisiana.[24]

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22 Venues counted are for theatre and larger concerts. For small music venues and drinking places that feature music, see the Music chapter.
23 Not including independent musicians and bands that play small venues and may or may not be formally organized, see the Music and Social Aid and Pleasure Clubs chapter.
24 From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.

LIVE PERFORMANCE PRODUCTION TAX CREDIT PROJECTS IN NEW ORLEANS

As in film production, New Orleans has a natural advantage in attracting live entertainment productions. As Louisiana's top tourist destination, it has the visitor draw to attract large productions from around the world. With its unique culture, New Orleans will continue to be home to local creative performance groups in theatre, dance, and music.

New Orleans benefits greatly from the State's live performance tax credits. From 2008-2013, the city was the location for 85% of the projects.[25] As can be seen in the table below, New Orleans has benefitted from over $11 million in local expenditure and over 1,400 jobs over the past 6 years.

Live Performance Tax Credit Projects in New Orleans

Year	Productions	Expenditures	Payroll	Jobs
2008	1	$21,081	None Filed	60
2009	4	$1,881,531	$300,730	167
2010	8	$4,164,029	$532,067	566
2011	6	$4,696,239	$362,363	454
2012	3	$119,027	$63,805	77
2013	2	$567,746	$350,967	105
Totals	**24**	**$11,449,653**	**$1,609,932**	**1,429**

OVERVIEW OF LOUISIANA LIVE PERFORMANCE INFRASTRUCTURE INCENTIVES

The Live Performance Infrastructure Incentives are very similar to the Production Incentives. There is also a $100,000 minimum local, in-state investment in a theatre or performance space structure or renovation. Project investors can receive up to a 25% tax credit for the investment is available for projects over $1,000,000 in local expenditures. This incentive also has a 10% Louisiana resident payroll tax credit. Until the end of 2014, all theater infrastructure projects are eligible for the incentive program, but after 2014, only projects that take place on the campuses or property of universities, colleges, or other higher education institutions will be eligible. This change will drastically reduce the impact of the incentive program for live performance infrastructure in New Orleans.[26]

LIVE PERFORMANCE INFRASTRUCTURE TAX CREDIT PROJECTS IN NEW ORLEANS

Because of its extensive existing theatrical venue infrastructure, New Orleans has had plenty of investment in restoring both grand venues like the Saenger Theatre and smaller community-based venues like the Ellis Marsalis Center for Music in the Upper Ninth Ward. Since 2007, New Orleans has averaged 49% of all projects in the state in any given year.

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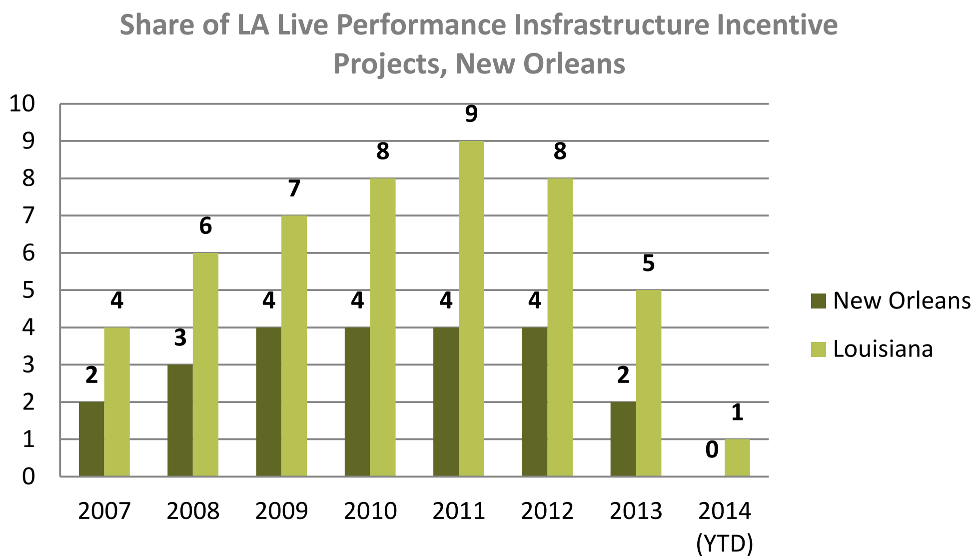
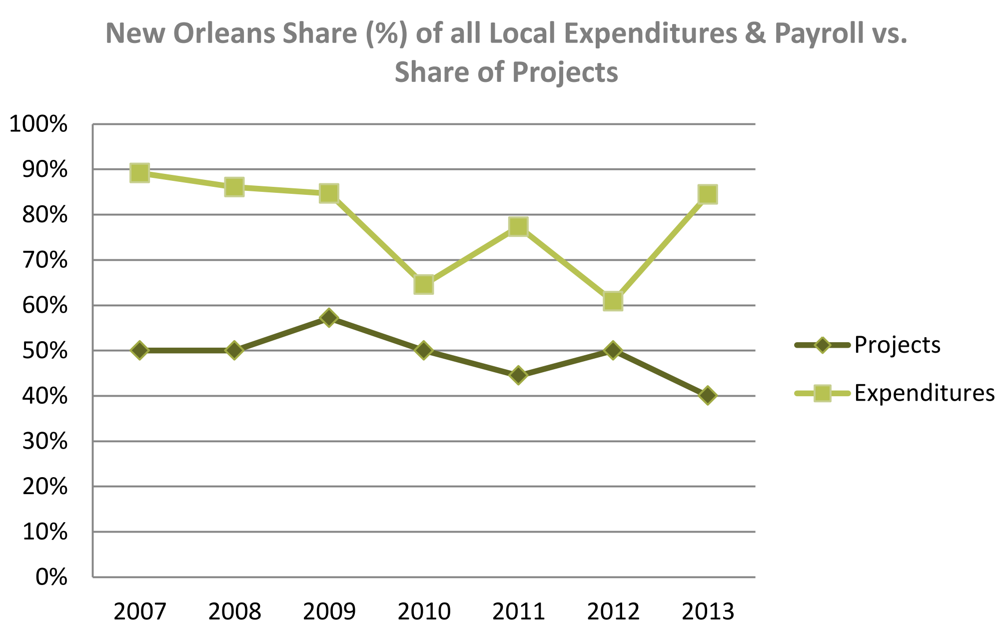
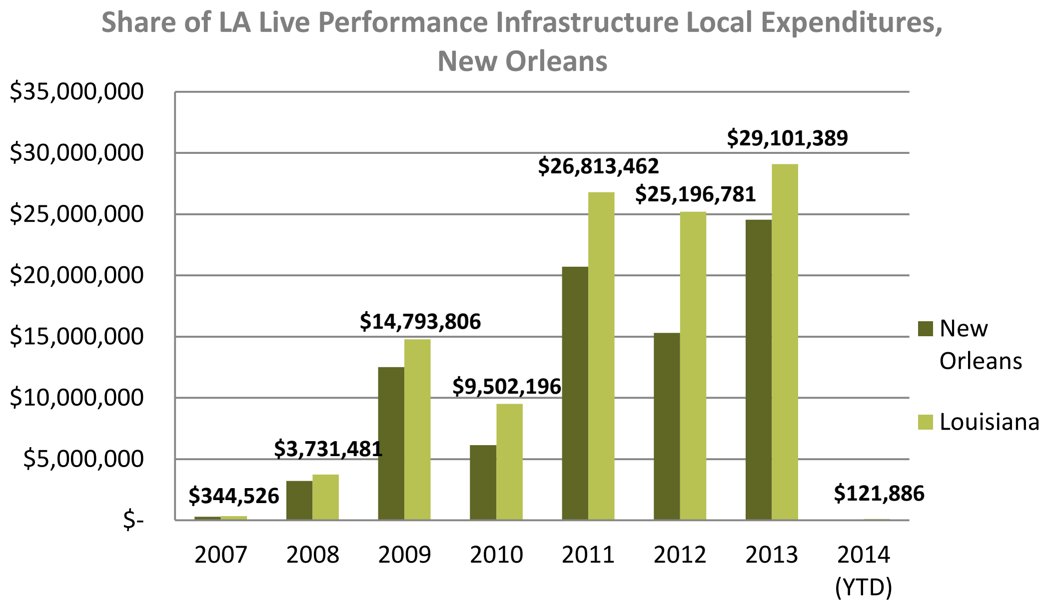
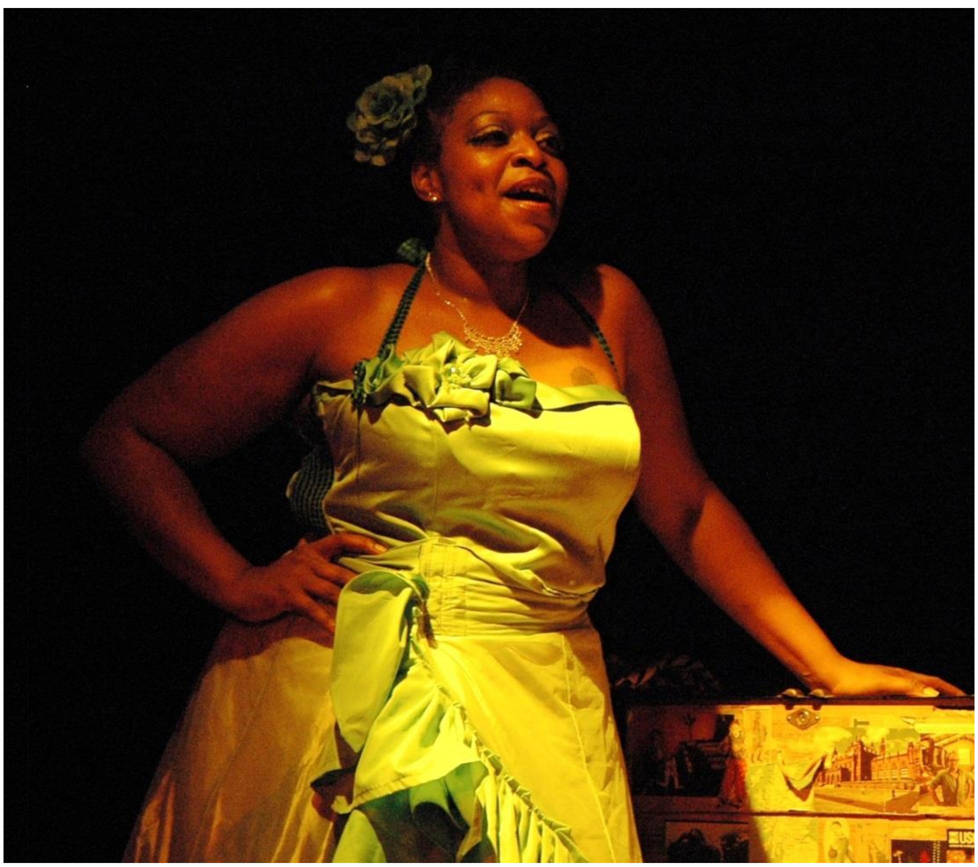
[25] Only certified projects that had received some or all credits from the State of Louisiana were included in this data set. Data from previous *Snapshot* publications was adjusted to reflect the final numbers. A number of productions that applied and were initially certified in previous years did not end up receiving tax credits and had to be excluded.
[26] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.



But the size of the recent investment in New Orleans live performance infrastructure is really demonstrated by the local expenditure of these projects. In any given year since 2007, New Orleans averaged 78% of local expenditures of all productions in the state, representing much larger and more expensive projects. In total, $82.8 million was spent locally in New Orleans, or 76% of all local expenditure for the program for the entire state. Over $3 million was paid to workers in New Orleans' projects, or 90% of all payroll expenditures for all projects in the state from 2007 to 2013.




Share of LA Live Performance Infrastructure Local Expenditures, New Orleans
$35,000,000
$30,000,000
$25,000,000
$20,000,000
$15,000,000
$10,000,000
$5,000,000
$-
$344,526
$3,731,481
$14,793,806
$9,502,196
$26,813,462
$25,196,781
$29,101,389
$121,886
2007
2008
2009
2010
2011
2012
2013
2014 (YTD)
New Orleans
Louisiana



SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

MUSIC

MUSIC PERFORMANCES AND ECONOMIC IMPACT

In the Businesses chapter, this survey found that 49% (116) of Entertainment businesses are live music venues in 2014. Of all the drinking establishments in the city, we estimate that 24% have live music or DJs regularly. These are the bars and clubs that host local musicians multiple weekdays and weekends. To get an idea of how these venues and an estimated 4,000 individual musicians impact our economy, this survey looks at gig data. The Mayor's Office of Cultural Economy has compiled data on the number of gigs per year by venue and differences in those offerings by month, weekday/weekend, and festival days.

MUSIC GIGS

Examining the frequency and timing of live music gigs in New Orleans in 2014 will give us more information on what work is available to local musicians and how large events, particularly music festivals, effect the number of gigs. There were 28,157 music gigs last year, 3.7% less than in 2013.

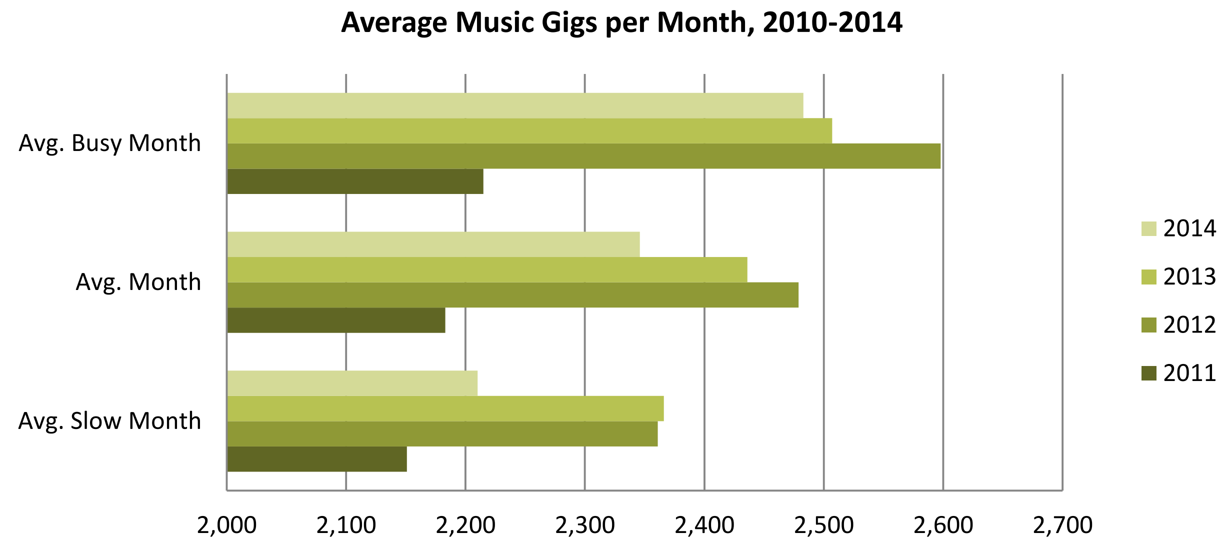
The 2014 data shows that high volume tourism months (busy) have 12% more gigs than lower volume months (slow). This is comparable to the 2012 difference of 10%. However, for the fifth year in a row, the difference between tourism seasons seems to be negligible when compared to days of the week and especially festival days.

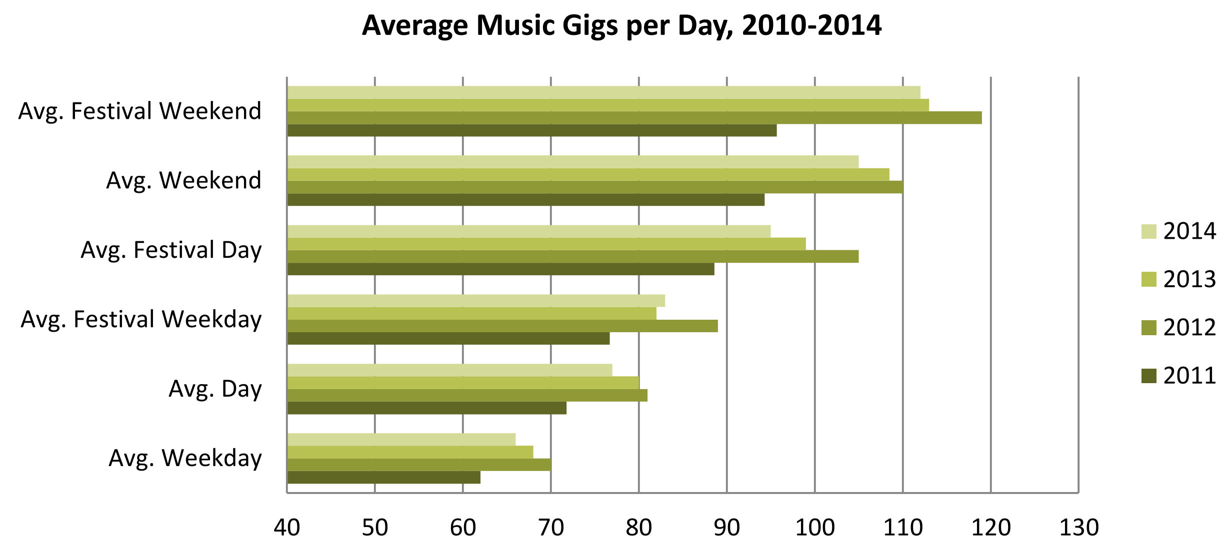
When we examine the average local music gigs per day, it can tell us what effect weekends[27] and special events have on performance opportunities for musicians. Festivals have a large impact on the average number of gigs that are not related to the festival (23% more gigs on average on a festival day as opposed to an average day). Festivals taking place in the city tend to increase gigs on week days and any given day overall.

The impact of festivals and events then, particularly music festivals, is positive on the number of local live music gigs in the city and therefore for performance opportunities for local musicians. Of course, some festivals bring in large numbers of regional and national visitors and can be related to tourism.

But it would appear that the busy tourism season has less of an impact on gigs than music-related events. The events that most positively affect gigs are those that take place near live music venues, such as French Quarter Festival. It makes sense that venues at or near a festival location book more musicians during the festival to capitalize from the presence of a potentially larger audience.

[27] Weekends in this data refers to Friday and Saturday gigs, most of which take place in the evenings. Weekdays refers to Sunday through Thursday gigs, again, most of which take place in the evening.





During the rare times when a major festival or event is not taking place in New Orleans, gigs tend to concentrate on the weekends and drop off sharply during the week. An average weekend day has 105 performances and an average weekday only 66 or 37% less than weekends. This concentration is not solely due to an increase in the number of venues offering live music on Fridays and Saturdays, although that is certainly the case, but also to an increase in multiple gigs at single venues. So a bar that only features one band on Wednesdays and Thursdays may feature anywhere from 2 to 5 on a weekend, increasing the number of gigs on that night.

Live Musical Gigs per Day 2014[1]

																																Totals		
Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Month	Sun-Thurs	Fri-Sat
January	37	46	65	70	50	31	36	50	62	103	93	48	44	57	61	77	105	101	72	52	57	63	84	106	103	65	56	59	66	81	106	2106	1254	852
February	85	48	48	59	58	72	106	104	76	61	65	62	78	104	110	66	53	63	74	85	113	112	70	56	66	70	72	107				2143	1302	841
March	80	72	72	52	37	60	89	82	69	51	51	73	76	103	99	82	61	66	87	90	115	95	71	55	52	75	98	123	125	84	53	2398	1487	911
April	59	71	86	111	114	70	53	71	82	100	119	116	89	58	65	81	98	112	109	82	58	76	89	131	141	139	124	89	124	142		2859	1898	961
May	116	123	127	94	60	63	59	76	87	100	73	45	53	72	85	93	102	89	52	59	58	71	100	97	71	52	57	68	67	97	105	2471	1440	1031
June	57	39	55	65	72	93	103	76	42	56	53	77	90	84	65	43	59	68	71	102	85	66	41	61	56	69	89	95	76	45		2053	1312	741
July	46	60	72	72	75	62	44	52	74	85	106	119	69	48	59	64	85	96	98	80	45	57	75	82	98	108	80	49	62	74	77	2273	1501	772
August	102	103	64	47	49	58	65	91	100	61	46	59	66	69	100	112	58	45	62	68	72	107	113	67	52	59	65	70	101	99	58	2288	1260	1028
September	33	46	49	70	105	106	59	46	66	66	83	102	100	66	50	60	64	86	98	109	88	51	66	77	97	114	121	80	64	76		2298	1443	855
October	66	80	103	112	72	58	69	77	85	104	105	75	64	70	75	100	137	111	80	59	73	85	88	133	122	71	69	75	76	94	139	2727	1661	1066
November	117	62	48	53	72	86	113	128	75	64	75	81	82	115	134	75	57	61	75	79	116	112	79	50	53	70	51	99	89	59		2430	1407	1023
December	36	47	54	72	97	98	59	54	60	64	72	101	101	64	45	61	77	78	114	92	58	57	56	26	25	98	86	57	58	59	85	2111	1324	787
Totals																																28157	17289	10868

- Slow Months
- Fridays and Saturdays
- Mardi Gras
- Congo Square Rhythms Festival
- French Quarter Festival
- Jazz and Heritage Festival
- Bayou Boogaloo
- Cajun Zydeco Festival
- Essence Festival
- Satchmo Summerfest
- Crescent City Blues and BBQ Festival
- VooDoo Music Experience
- Treme Creole Gumbo Festival
- New Year's Eve

[1] Music Gig data is from WWOZ Livewire Music Calendar Archives; http://www.wwoz.org/new+orleans+community/music+calendar

FESTIVALS AND EVENTS

OVERVIEW

In New Orleans, festivals are a way of life. With 130 festivals, events, and outdoor markets, New Orleans has more festivals than weekend days in the year. While many of these events primarily feature a single part of our local cultural economy such as performing arts, food, or visual art, almost all festivals and even farmers and art markets include a combination of all three or more aspects of New Orleans cultural life.

Harrison Avenue Marketplace features food, music, culinary demonstrations, art and more. Large music events such as the French Quarter Festival have both 20 stages for music and gourmet food stands from local restaurants. In fact, the food vendors and menu offerings are listed and dissected in local papers as much as the music. The Jazz and Heritage Festival also features an exclusive crafts and art market, selling local artists', sculptors', and jewelry designers' wares. In recent years, other large music festivals such as Essence Music Festival and VooDoo Experience have also added art marketplaces to their events as well as local food vendors.

Every event in New Orleans is unique, from an annual neighborhood festival such as the Freret Street Festival Uptown to the citywide celebration of Mardi Gras. This chapter will provide an overview and listing of many of the annual festivals here in New Orleans, starting with the types of festivals that took place in 2014 and an estimate of attendance for all 130 festivals included in this year's Snapshot. Using commissioned economic impact studies, we will then examine major events and their economic and tourism impacts. Finally, we will present the results of the fourth New Orleans Festival and Event Survey. This survey was designed to measure the local economic impact of events on employees, culinary workers, and musicians.

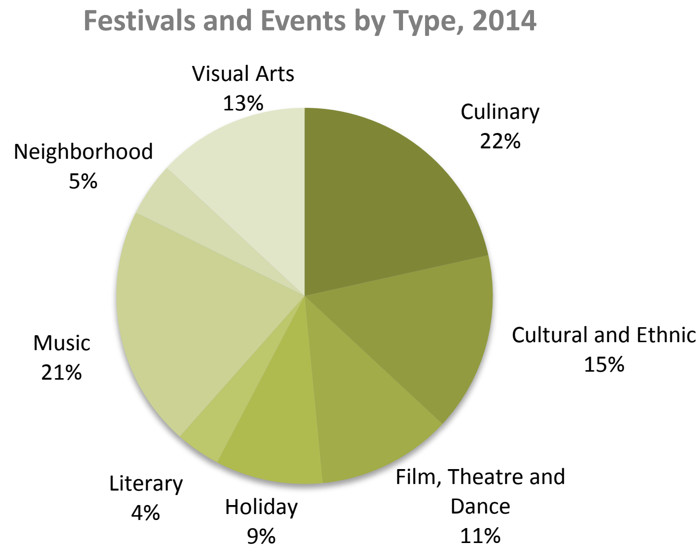
FESTIVAL OVERVIEW BY CULTURAL ECONOMY SEGMENT

Of the festivals and recurring markets surveyed here[28] culinary festivals are the most common; 22% of the 130 festivals were categorized as culinary festivals. Again, it is important to remember that most of these events feature more than one category, the most common combination being food and music. Visual arts also are often featured at events through art markets. Events were categorized by their dominant characteristic. So although Jazz Fest features food and visual art in addition to music, its primary purpose is music. The New Orleans Po-Boy Festival on Oak Street has music and visual art vendors, but its focus is the multitude of food vendors serving New Orleans' most famous sandwich and is thus categorized as a culinary festival.

Music (21%), Cultural and Ethnic (15%), and Visual Arts (13%) are the next most common types of festivals. Cultural and Ethnic festivals include the many events celebrating New Orleans' African, Native

[28] Festival data was acquired through primary internet research, using existing material from the *2010-2013 Snapshots,* and using search engines. New festivals were included to the extent possible. Some festivals that are small in size or are not recurring festivals may not be included.

American, Caribbean, French, Spanish, Latin American, Italian, Cajun, and Irish heritage and current culture and populations.



OVERALL ATTENDANCE ESTIMATE

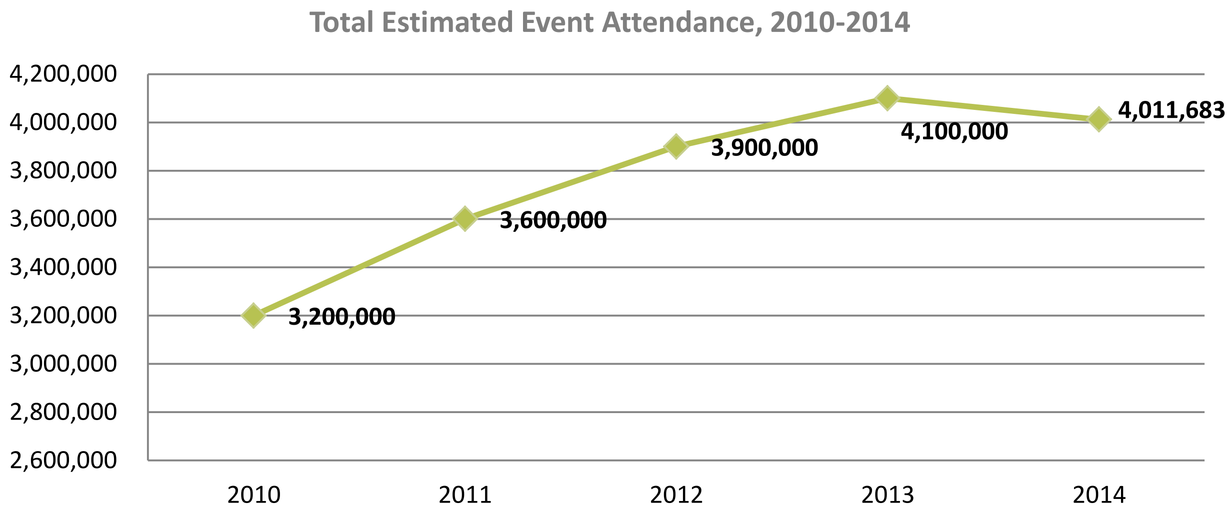
The City has several larger festivals and events, most notably Mardi Gras. In the table below, attendance of 4 large events and 1 small to mid-size event are examined. The total attendance for these 5 events in 2014 was 2.3 million. The 2014 New Orleans Festival and Event Survey found an additional 265,512 attendees for surveyed festivals not included in the table below. For the remaining 105 events, we can roughly estimate the number of attendees if we use average sizes for small (500 attendees), neighborhood (1,500), mid-size (4,000), large (10,000-15,000), and Downtown/French Quarter events (20,000-25,000).

Major Event Attendance Estimates

Event	2009	2010	2011	2012	2013	2014
Mardi Gras	750,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
French Quarter Festival	441,000	512,000	533,000	574,000	562,000	733,000
Essence Festival	428,000	405,000	419,000	413,400	540,000	543,126
Tales of the Cocktail	17,000	18,750	21,000	23,000	23,000	17,895
Bayou Boogaloo	20,000	23,000	27,000	25,000	35,000	38,000
Totals	**1,755,000**	**2,082,750**	**2,149,000**	**2,176,400**	**2,162,013**	**2,332,021**

Of course, this estimate is not only rough, but probably also undercounting some events and over-counting others. However, using this estimate, New Orleans' festivals enjoyed the patronage of 4 million people in 2014, a 25% increase since 2010.

Festivals are increasingly popular in recent years, and many, such as the French Quarter Festival, Tales of the Cocktail, and the Po-Boy Preservation Festival have grown impressively over the past 3-4 years. Finally, many people, especially locals, attend more than one festival, so there is overlap among this number.



MAJOR EVENT ECONOMIC IMPACT

Because of the frequency and popularity of festivals and events in New Orleans, some festival organizers conduct or commission their own economic impact surveys and studies each year. The information they gather helps them gather sponsorships and publicity, as well as track the health of their festival and input from attendees to improve future events.

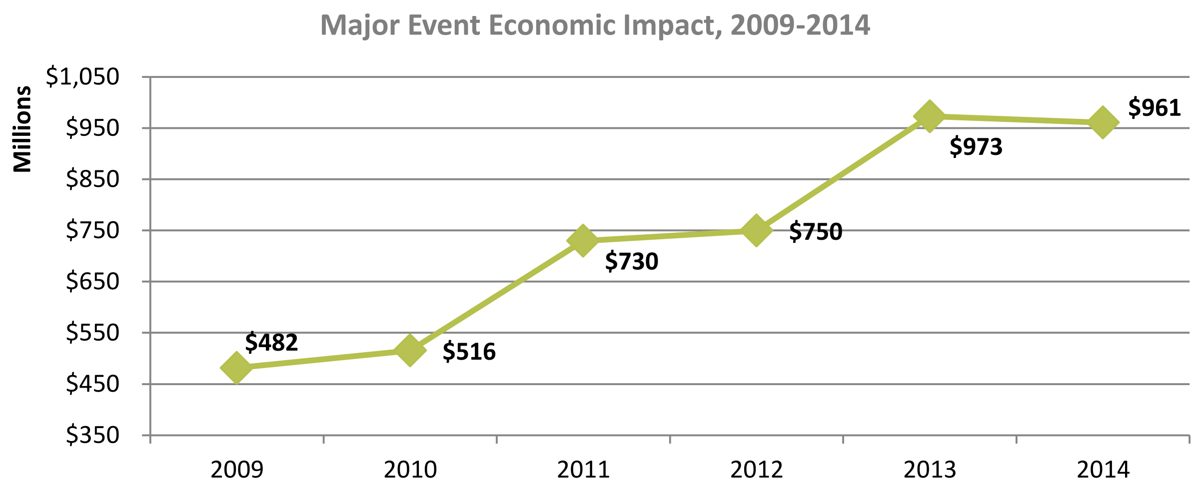
Major Event Economic Impact

Event	2009	2010	2011	2012	2013	2014
Mardi Gras	$332,209,017	Not Available	$300,700,000	$340,000,000	Not Available	$465,214,106
French Quarter Festival	$139,600,000	$316,000,000	$245,700,000	$259,500,000	$247,000,000	$251,000,000
Essence Festival	Not Available	$188,200,000	$170,400,000	$135,900,000	$231,600,000	$231,600,000
Tales of the Cocktail	$9,700,000	$11,300,000	$12,700,000	$14,300,000	$14,100,000	$12,800,000
Super Bowl XLVII					$480,000,000	
Totals	**$481,509,017**	**$515,500,000**	**$729,500,000**	**$749,700,000**	**$972,700,000**	**$960,614,106**

There has been a general increase in attendance of major events from 2009-2014. More people are attending major events, markets, and mid-size festivals every year. Tourists at events such as Essence and Tales of the Cocktail outnumber locals, increasing economic impact of these events through hotel stays, restaurant spending, and shopping.

As would be expected, the Super Bowl greatly increased the impact of local events in 2013. Almost $1 billion in economic impact was calculated for all 6 events. This is a 27% increase from 2012. In 2014, economic impact of events continued to increase significantly. Mardi Gras' economic impact[29] increased by 37% from the last estimated impact in 2012. Although the 2014 impact total is slightly less than the 2013 total, this is due to the one-time impact of the Super Bowl and the much increased impact of Mardi Gras more than compensates for the lack of that event, showing an impressive 28% increase from 2012, the last year before the Super Bowl.

The economic impact numbers above measure mainly the impacts of out-of-town visitors, spending money on lodging, meals, and entertainment. As we will see below, local attendees also have an economic impact, as do local festivals as purchasers of local goods and services.



LOCAL ECONOMIC IMPACT OF FESTIVALS AND EVENTS

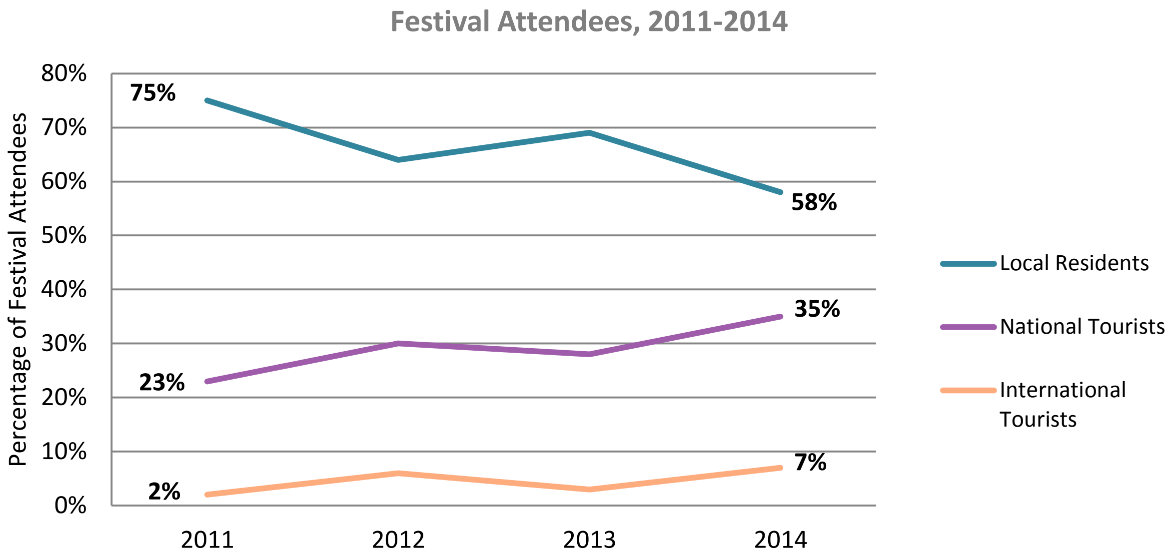
Cultural festivals and events provide several benefits that larger, more commercial, or more visitor oriented events do not. They can serve as an incubator for local performers and visual artists, allowing them to earn income, experience, and reputation. These can be used to gain access to professional venues such as clubs and galleries. Festivals' local economic impact is not only about overall monetary gain, but also about diversifying local economy. Festivals can provide a relatively reliable source of income for locals despite fluctuations in the greater marketplace. We can see this is so in the Highlights table to the right.

2014 Surveyed Festival Highlights	
Total Local Expenditures	$3,996,103
Local Entertainers	602
Local Entertainment Expenditures	$719,370
Food and Art Vendors	1,420
Total Attendance	998,512

In order to measure the local economic impact of festivals, the Office of Cultural Economy

[29] From Weiss, Toni and the Freeman Consulting Group. 2015. *The Economic Impact of the Mardi Gras Season on the New Orleans Economy and the Net Fiscal Benefit of Staging Mardi Gras for the City of New Orleans*.

conducted a 2014 Festival and Event Survey identical to the surveys in previous years.[30] Our primary goals were to determine economic value of local festivals for cultural workers, particularly musicians, food vendors, and arts and crafts vendors; employment stemming directly from the festival and its economic benefits; and expenditure on local resources.



Of the events surveyed in 2014, 58% of attendees at surveyed festivals were locals. This is 11% lower than in 2013, and 17% lower than in 2011, meaning more tourists are attending local festivals than ever in recent years. In terms of economic impact on local businesses, this increase in tourists means an increase in spending, as tourists tend to spend more on local goods and services when visiting for an event.

The age of surveyed events ranged from 0 year to 32 years, with an average age of 13 years, very close to previous surveys. Half of surveyed events were under 10 years old and started after 2005. The local festival economy has rebounded impressively from Katrina and continued to grow since, despite economic turbulence and the oil spill in 2010 which depressed tourism in the Gulf Coast region. In 2014, the total attendance for surveyed events was 998,512 people with an average of 47,548 people per event.

Local expenditure of surveyed festivals are those dollars that were spent in New Orleans and nearby communities, such as staging, permitting, rentals, site fees, entertainment, etc. Local expenditures of surveyed events ranged from $6,000 to $2,000,000 with an average of $190,291.

All entertainment acts were local, from New Orleans itself or the Greater New Orleans area. On average, 29 entertainment acts were booked per festival. Festivals paid an average of $37,862 for their entertainment in total.

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[30] The 2014 Festival and Event Survey in this paper had a response rate of 19% or 21 festivals out of the total 110 contacted. The sample includes wide ranges of budget, type, and attendance. Statistical significance of the results was not calculated and at most, tentative correlations are noted, not causation or correlation coefficients.

Food vendors were common at surveyed events. On average, events had 21 food vendors, although vendors ranged from 0 to as many as 150 for surveyed events. Food vendors are often local restaurants, caterers, or mobile food vendors. Of the festivals surveyed 100% reported using exclusively local food vendors. Festival work most likely represents a significant portion of culinary economic activity for local vendors. New Orleans is also known for its eclectic and active local art scene. Most events feature an artists' market or craft fair within the festival. The surveyed events featured 810 art or craft vendors. On average, events featured 41 vendors.

Local festivals provide jobs and income for thousands in New Orleans. Local musicians and other performers benefit greatly monetarily from locally-oriented festivals and are featured heavily, giving them constant exposure to new audiences and enhancing their reputation with the public. Although it is beyond the means of this current survey, it is likely that festival work impacts the gigs available to musicians and other performers that participate in them. Finally, local festivals mean local expenditures. Festivals directly stimulate New Orleans' economy by buying and renting locally. Economic impact is not only from hotels and tourist dollars, but from these diverse, vibrant, and numerous smaller festivals, most of which are created by locals for locals. These grassroots festivals enhance the culture and image of our city, and bring our neighborhoods and population together. Festivals, large and small, local and visitor oriented, are also attended by a significant amount of tourists, and represent a crucial part of both the tourism and cultural economies of New Orleans.

Festival	Type	Month
KING CAKE FESTIVAL	Culinary Arts	January
FRERET STREET OYSTER JAM	Neighborhood	January
TET LUNAR NEW YEAR	Holiday	January-February
REDD LINEN NIGHT	Visual Arts & Crafts	February
MARDI GRAS	Holiday	February-March
FOODFEST: AMERICA'S HOMETOWN EATS	Culinary Arts	March
FOOD REVUE	Culinary Arts	March
HOGS FOR THE CAUSE	Culinary Arts	March
NEW ORLEANS INTERNATIONAL BEER FESTIVAL	Culinary Arts	March
NEW ORLEANS OYSTER JUBILEE	Culinary Arts	March
STREET FOOD FESTIVAL AND VENDY AWARDS	Culinary Arts	March
FETE FRANCAISE	Cultural & Ethnic	March
INDIA FEST	Cultural & Ethnic	March
SUPER SUNDAY DOWNTOWN	Cultural & Ethnic	March
SUPER SUNDAY UPTOWN	Cultural & Ethnic	March
SUPER SUNDAY WESTBANK	Cultural & Ethnic	March
EARTH FEST	Holiday	March
PARASOL'S ST. PATRICK'S DAY BLOCK PARTY	Holiday	March
TENNESSEE WILLIAMS NEW ORLEANS LITERARY FESTIVAL	Literary	March
BACH AROUND THE CLOCK	Music	March
BUKU FEST	Music	March
CONGO SQUARE RHYTHMS FESTIVAL	Music	March
SACRED MUSIC FESTIVAL	Music	March

Festival	Type	Month
SOUL FEST	Music	March
ART IN BLOOM	Visual Arts & Crafts	March
FASHION WEEK	Visual Arts & Crafts	March
NEW ORLEANS SPRING FIESTA	Holiday	March-April
CRAWFEST	Culinary Arts	April
TASTE AT THE LAKE	Culinary Arts	April
ASIAN HERITAGE FESTIVAL	Cultural & Ethnic	April
UMOJA CELEBRATION OF THE AFRICAN CHILD	Cultural & Ethnic	April
FLEUR DE LINDY SWING HOP DANCE FESTIVAL	Dance	April
NEW ORLEANS DANCE FESTIVAL	Dance	April
NEW ORLEANS EARTH DAY FESTIVAL	Holiday	April
FRENCH QUARTER FESTIVAL	Music	April
FRERET STREET FESTIVAL	Neighborhood	April
NEW ORLEANS GIANT PUPPET FESTIVAL	Theatre	April
JAMMIN ON JULIA	Visual Arts & Crafts	April
NEW ORLEANS JAZZ AND HERITAGE FESTIVAL	Music	April-May
CRAWFISH MAMBO	Culinary Arts	May
NEW ORLEANS WINE AND FOOD EXPERIENCE	Culinary Arts	May
GREEK FESTIVAL	Cultural & Ethnic	May
FILM-O-RAMA	Film & Video	May
SAINTS AND SINNERS LITERARY FESTIVAL	Literary	May
BAYOU BOOGALOO	Music	May
BIRDFOOT CHAMBER MUSIC FESTIVAL	Music	May
CREOLE TOMATO FESTIVAL	Culinary Arts	June
FESTIGALS	Cultural & Ethnic	June
FRENCH SUMMER WINE FESTIVAL	Culinary Arts	June
NEW ORLEANS OYSTER FESTIVAL	Culinary Arts	June
SNAKE OIL FESTIVAL	Dance	June
LOUISIANA CAJUN ZYDECO FESTIVAL	Music	June
NEW FANGLED FESTIVAL OF OPERA	Music	June
TALES OF THE COCKTAIL	Culinary Arts	July
BASTILLE DAY CELEBRATIONS	Cultural & Ethnic	July
MAAFA COMMEMORATION	Cultural & Ethnic	July
NEW ORLEANS FRENCH FILM FESTIVAL	Film & Video	July
OUTTAKES FILM FESTIVAL	Film & Video	July
GO FOURTH ON THE RIVER	Holiday	July
RUNNING OF THE BULLS	Holiday	July
ESSENCE MUSIC FESTIVAL	Music	July
GREAT AMERICAN SEAFOOD COOKOFF	Culinary Arts	August
MID-SUMMER MARDI GRAS	Cultural & Ethnic	August
SATCHMO FEST	Music	August
SIX STRING MUSIC FESTIVAL	Music	August

Festival	Type	Month
DIRTY LINEN NIGHT	Visual Arts & Crafts	August
WHITE LINEN NIGHT	Visual Arts & Crafts	August
FALL GARDEN FESTIVAL	Culinary Arts	September
SOUTHERN DECADENCE	Cultural & Ethnic	September
NEW ORLEANS BURLESQUE FESTIVAL	Dance	September
NEW ORLEANS CHILDREN'S FILM FESTIVAL	Film & Video	September
MIGHTY MISSISSIPPI DOWNRIVER FESTIVAL	Literary	September
CARNAVAL LATINO	Music	September
NOLA DOWNTOWN MUSIC AND ARTS FESTIVAL	Music	September
PONDEROSA STOMP	Music	September
ST. AUGUSTINE EDWIN HAMPTON MUSIC FESTIVAL	Music	September
LOUISIANA SEAFOOD FESTIVAL	Culinary Arts	October
CELEBRACION LATINA	Cultural & Ethnic	October
INTERNATIONAL FESTIVAL	Cultural & Ethnic	October
JAPAN FEST	Cultural & Ethnic	October
NICKEL-A-DANCE	Dance	October
NEW ORLEANS FILM FESTIVAL	Film & Video	October
NEW ORLEANS IRISH FILM FESTIVAL	Film & Video	October
BOO CARRE HALLOWEEN AND HARVEST FESTIVAL	Holiday	October
NEW ORLEANS BOOK FESTIVAL	Literary	October
CRESCENT CITY BLUES AND BBQ FESTIVAL	Music	October
PRAISE FEST	Music	October
VOODOO EXPERIENCE	Music	October
FETE MARIGNY	Neighborhood	October
GENTILLY FEST	Neighborhood	October
MIRLITON FESTIVAL	Neighborhood	October
ALGIERS FOLK ART FESTIVAL	Visual Arts & Crafts	October
ART FOR ART'S SAKE	Visual Arts & Crafts	October
PROSPECT: P3	Visual Arts & Crafts	October
LUNA FETE	Visual Arts & Crafts	October
BEAUJOLAIS FESTIVAL	Culinary Arts	November
NEW ORLEANS PO-BOY PRESERVATION FESTIVAL	Culinary Arts	November
TREME CREOLE GUMBO FESTIVAL	Culinary Arts	November
BAYOU BACCHANAL	Cultural & Ethnic	November
FOLK MAGIC FESTIVAL	Cultural & Ethnic	November
SCANDINAVIAN FESTIVAL	Cultural & Ethnic	November
WORDS AND MUSIC	Literary	November
2ND DISTRICT BLUES FESTIVAL	Music	November
CENTRAL CITY FESTIVAL	Music	November
LADYFEST	Music	November
HELL YES FEST	Theatre	November
NEW ORLEANS FRINGE THEATER FESTIVAL	Theatre	November

Festival	Type	Month
TALES OF THE TODDY	Culinary Arts	December
MARCHE D'HIVER	Cultural & Ethnic	December
BIG EASY INTERNATIONAL FILM FESTIVAL	Film & Video	December
ALGIERS CHRISTMAS BONFIRE	Holiday	December
CHRISTMAS NEW ORLEANS STYLE	Holiday	December
HOLIDAY ON THE BOULEVARD	Holiday	December
JAZZ IN THE PARK	Music	Fall to Spring
THURSDAYS AT TWILIGHT	Music	Fall to Spring
WEDNESDAYS AT THE SQUARE	Music	Fall to Spring
CRESCENT CITY FARMERS MARKET (4 LOCATIONS)	Culinary Arts	Year-round
FOOD TRUCK ROUNDUPS	Culinary Arts	Year-round
HOLLYGROVE MARKET AND FARM	Culinary Arts	Year-round
MARKETPLACE AT ARMSTRONG PARK	Culinary Arts	Year-round
OLD ALGIERS HARVEST FRESH MARKET	Culinary Arts	Year-round
SANKOFA MARKETPLACE	Culinary Arts	Year-round
FRERET STREET MARKET	Neighborhood	Year-round
FRIDAY NIGHTS AT NOMA	Visual Arts & Crafts	Year-round
HARRISON AVENUE MARKETPLACE	Visual Arts & Crafts	Year-round
OCH ART MARKET	Visual Arts & Crafts	Year-round
OGDEN AFTER HOURS	Visual Arts & Crafts	Year-round
PALMER PARK ARTS MARKET	Visual Arts & Crafts	Year-round
PIETY STREET MARKET	Visual Arts & Crafts	Year-round
RENAISSANCE MARKETPLACE	Visual Arts & Crafts	Year-round

SEGMENTS OF THE CULTURAL ECONOMY: DESIGN

INTERACTIVE MEDIA

OVERVIEW OF LOUISIANA INTERACTIVE MEDIA INCENTIVES

Louisiana sees the potential in the digital interactive industry. Its Digital Interactive Media Incentive targets gaming, simulation training, web applications and the next generation of distributed Entertainment. The Interactive Media Incentive initiative hopes to build this industry and support a highly skilled, creative and technology-driven workforce.

Louisiana offers a 25% tax credit for in-state production expenditures and a 10% tax credit for Louisiana resident payroll expenditures for gaming, web applications, and the next generation of interactive content. There are no minimum investment requirements and no cap on production expenditures. Credits may be applied to Louisiana tax liability, sold back to the state, or sold on the secondary market.[31]

INTERACTIVE MEDIA IN NEW ORLEANS

As outlined in the Employment and Businesses chapters, there are 58 graphic and web design businesses in New Orleans in 2014, a 14% increase from 2013. There were 407 jobs in graphic design and specialized design services in 2014, of those, 253 jobs were self-employment, or 62%, meaning that many graphic designers and others in interactive media and programming work from home, as contractors, or in another independent fashion.[32]

While New Orleans has about 25% less Design jobs when compared to the United States as a whole, New Orleans also has several post-production special effects and digital effects studios that may develop interactive media. Human resources and business management companies also at times devleop their own software to manage payroll, finances or other incentive-qualifying projects. Health sciences businesses may commission or have small limited liability companies that develop software to help doctors and patients interact, electronic charting and more.

As can been seen in the accompanying graphs, New Orleans continues to net less than 50% of interactive media projects that qualify and apply for the Louisiana Interactive Media Tax Credits.[33] Although not calculated, the majority of firms applying for incentives seem to be located in the Shreveport and Baton Rouge areas.[34] Consequently, New Orleans' average share of local expenditures and payroll from the years 2009-2014 never rises above 25%. However, if we compare the proportion of local expenditure and payroll to the proportion of projects the City nets, some improvement is evident.

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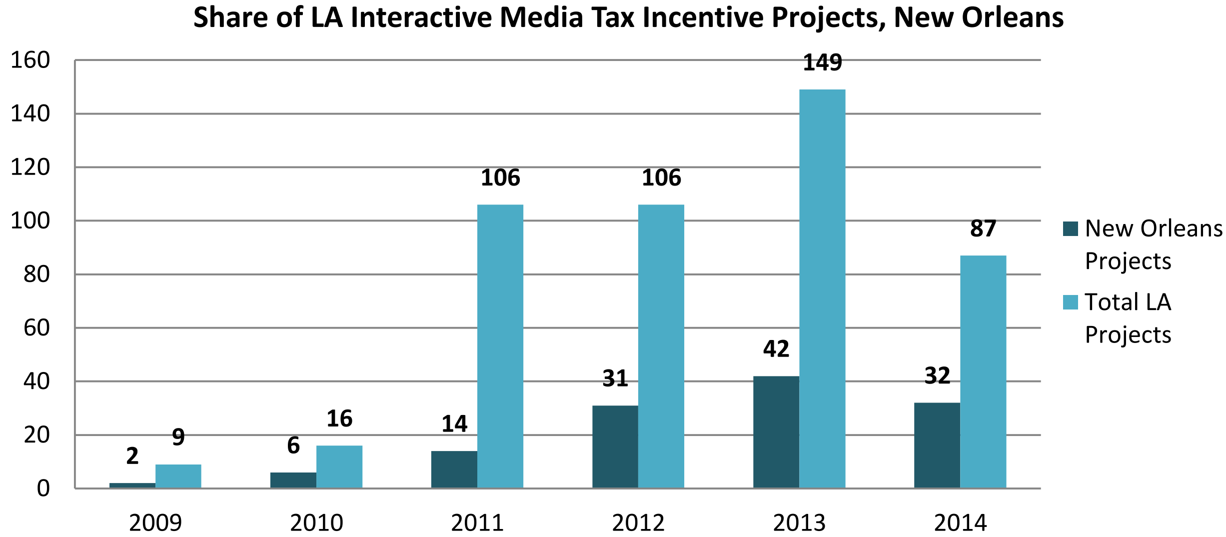
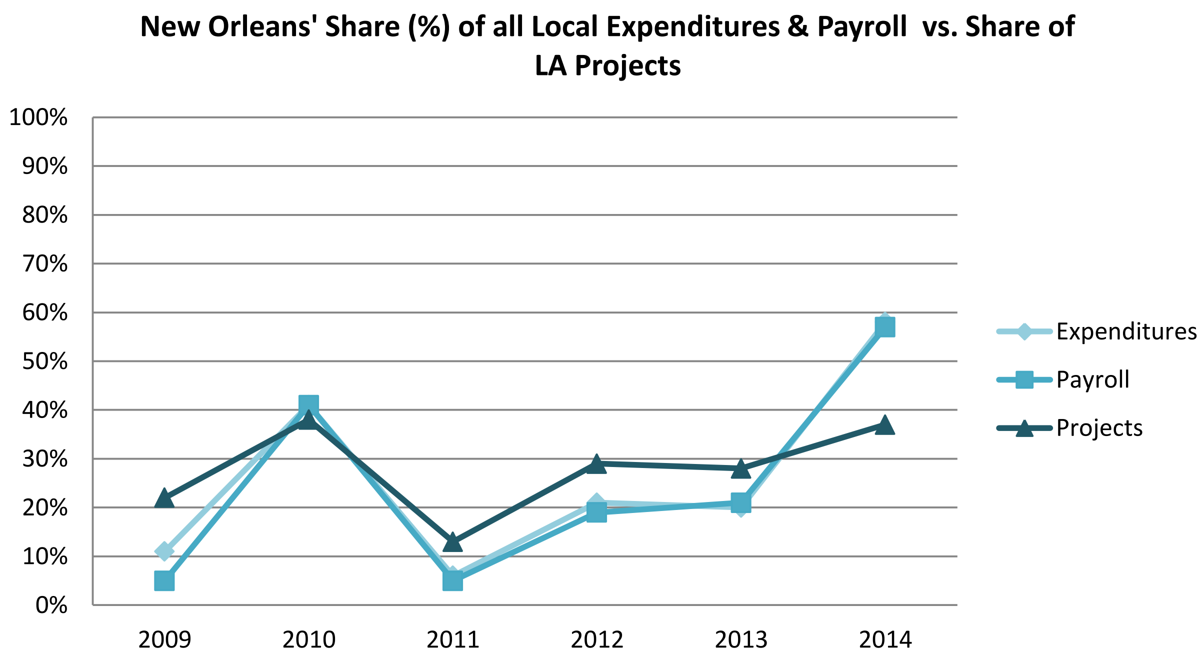
[31] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index

[32] From Mt. Auburn Associates' ESMI data for 2014, included in the Design segment described in the Employment Chapter.

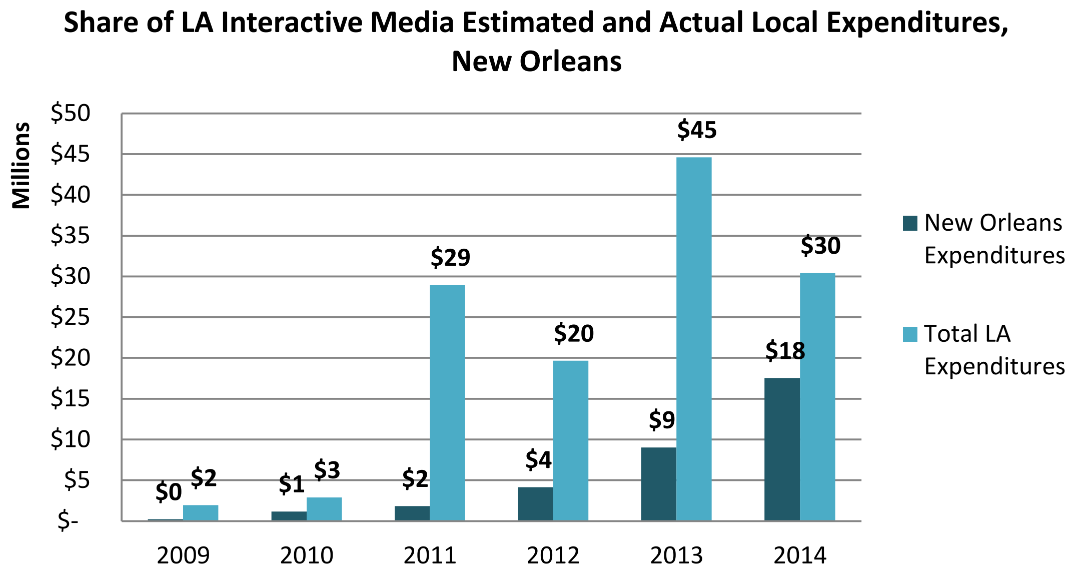
[33] For this survey, only projects that were certified and to which the state had paid tax credits were counted. 2009-2013 data was adjusted to reflect any changes, updates in the data and other adjustments made by the State of Louisiana.

[34] Location of Interactive Media Tax Incentive projects were determined by the address listed on the application for each project.

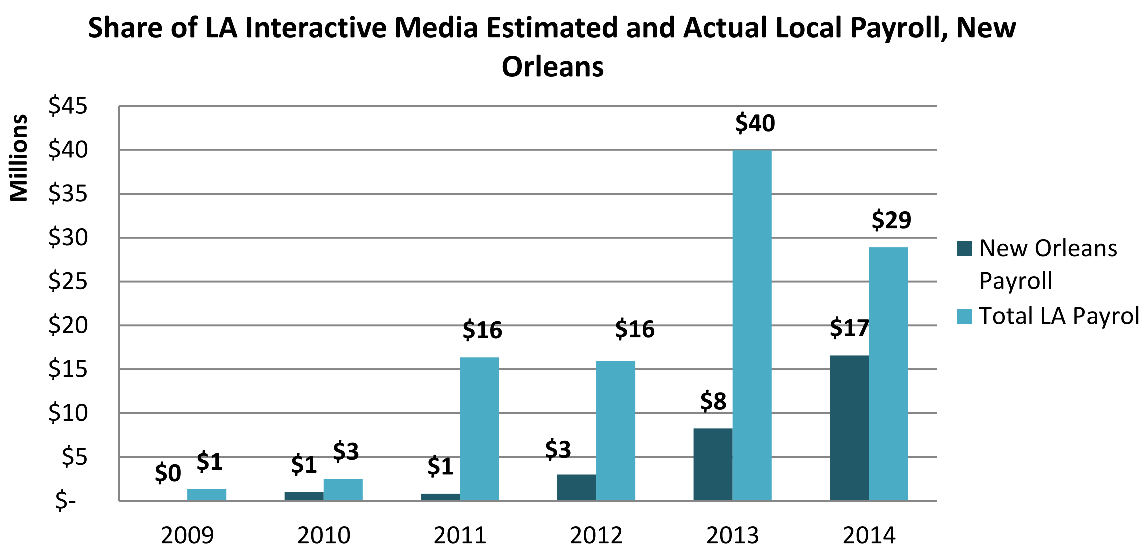




Generally, the local expenditure and payroll of projects is not proportional to the number of projects the city hosts. For example, in 2009, the city netted 22% of all interactive media projects in the state, but only 11% of all local expenditures by these projects in the state. Basically, interactive media projects in New Orleans are spending and paying employees less locally than projects in other parts of the state. However, in 2010, expenditure and payroll managed to slightly exceed the proportion of projects and since then the gap between the number of projects and their investment in the local economy and workforce has been closing. In 2014, payroll and expenditure far exceeds the percentage of projects, but that is likely to change once more 2014 projects are certified in 2015.



Share of LA Interactive Media Estimated and Actual Local Expenditures, New Orleans
Millions
$50
$45
$40
$35
$30
$25
$20
$15
$10
$5
$-
$0
$2
$1
$3
$2
$29
$4
$20
$9
$45
$18
$30
2009
2010
2011
2012
2013
2014
New Orleans Expenditures
Total LA Expenditures



Share of LA Interactive Media Estimated and Actual Local Payroll, New Orleans
Millions
$45
$40
$35
$30
$25
$20
$15
$10
$5
$-
$0
$1
$1
$3
$1
$16
$3
$16
$8
$40
$17
$29
2009
2010
2011
2012
2013
2014
New Orleans Payroll
Total LA Payroll

SEGMENT FEATURE: VISUAL ARTS AND CRAFTS

MUSEUMS

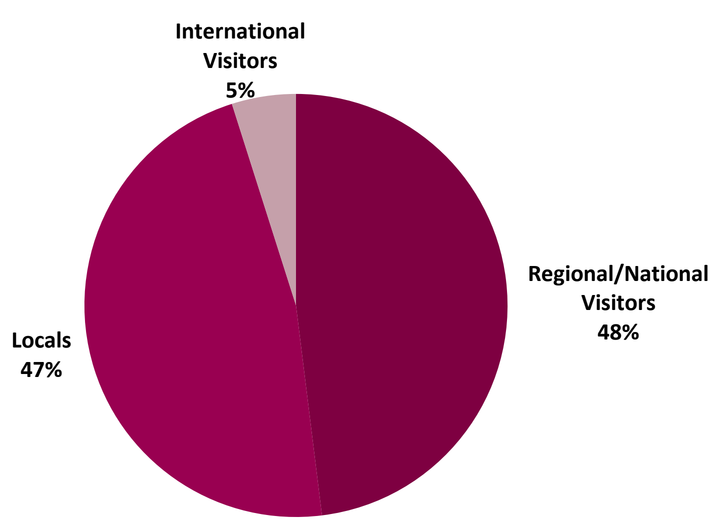
Museums are an important feature of all 22 CPDs and of the city's cultural economy in general. New Orleans boasts several major museums, the most prominent being the National World War II Museum, which has the highest ticket sales of all the major museums surveyed and is a major tourist draw. The century old New Orleans Museum of Art, the Ogden Museum of Southern Art, the Southern Food and Beverage Museum, the Louisiana Children's Museum, the Cabildo, and the Old US Mint are also important regional draws, featuring local and Southern arts, culture and history. The City also has a handful of smaller, locally run and sourced museums dedicated to New Orleans' unique history. The Backstreet Cultural Museum and the House of Dance of Feathers feature New Orleans' traditional cultural activities, especially second lines and Mardi Gras Indian rituals and parades. The African American Museum in the Tremé features the unique local history of free and enslaved people of color throughout New Orleans history. Finally, the city has a large inventory of historic homes once owned by significant figures in local, national, and international history. These historic home museums give tours and also often host events.

In 2014, the city's largest museums hosted 657,000 visitors, sold $10.6 million in tickets and paid $14 million in local payroll to 387 employees. Museums are also attracting tourists and regional visitors more each year, with over half of patrons from the nation or outside of the United States.

Museums in New Orleans, 2012-2014

Year	Employees	Attendance	Ticket Sales	Payroll
2012	423	741,445	$7,513,314	$12,746,032
2013	447	764,121	$9,512,714	$15,053,956
2014	387	657,060	$10,640,221	$13,862,651

Museum Attendance Breakdown, 2014



METHODOLOGY

DEFINITION

The definition of the "cultural economy" used for this report is based on the one used in the 2011, 2012, and 2013 updates, which were themselves adaptations of the definition used in the 2005 Mt. Auburn Associates' report, *Louisiana: Where Culture Means Business*. Mt. Auburn developed six broad segments to describe the cultural economy in New Orleans: culinary arts, entertainment, preservation and heritage, literary arts, design, and visual arts. This year, Mt. Auburn had to update the cultural industries data definition to be compatible with 2012 NAICS codes, which EMSI switched to in the third quarter of 2014. The new cultural industries definition differs from the definition used in the 2013 update in the following ways:

- The new definition does not include "Camera and Photographic Supply Stores" and "Prerecorded Tape, CD, and Record Stores." These industries were merged into a new NAICS code "Electronics and Appliance Stores," which is predominantly made up of non-cultural industries.
- The new definition does not include, "Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing." This small industry became part of a much larger NAICS code that also included manufacturers of non-cultural ceramics products, including plumbing fixtures.
- The new definition does not include "Lead Pencil and Art Good Manufacturing," which was merged into a much larger code, "Office Supply Manufacturing." There had been no jobs in the pencil and art good code in New Orleans.
- The new definition includes NAICS 323111, a new code that combines all the commercial printing industries except for screen- and book-printing. NAICS 323111 includes two small industries that had not been part of the 2013 definition: "Blankbook, Looseleaf Binders, and Devices Manufacturing" and "Manifold Business Forms Printing." These industries have no significant presence in New Orleans.
- The new definition includes NAICS 339910, "Jewelry and Silverware Manufacturing," a new code that combines all jewelry and silverware production. The 2013 definition had only included "Jewelry (except Costume) Manufacturing." The three other NAICS industries that are part of NAICS 339910 have no significant presence in New Orleans.

Employment statistics in this update for the period 2002 to 2013 may vary from the statistics presented in previous updates because of the changes listed above and because EMSI revises its figures as more up-to-date data sets become available and as its algorithms change.[35] For these reasons, the figures in this update should not be directly compared to those in previous updates.

EMPLOYMENT DATA SOURCES

The employment statistics and figures in this update are based on data from EMSI's 4th Quarter 2014 release. EMSI's data set includes regular employment (wage and salary workers) as well as the self-employed. Self-employed workers include the self-employed proprietors counted in official census data

[35] Because some of the data sources used by EMSI have a significant lag, their updates can have a major effect on its employment figures as far as three years back.

as well as extended proprietorships—"workers who are counted as proprietors, but classify the income as peripheral to their primary employment." In the cultural economy, extended proprietorships are generally people with "day jobs" who also do freelance work in a creative field. Unless otherwise noted, the statistics in this report include both self-employed workers and regular employees.

It is important to note that all of the job figures in this report represent direct employment within a given cultural industry or occupation—there are no spending multipliers or other measures of indirect impact being included. Also, this report presents data on workers in cultural occupations who work for employers outside the cultural industries. Most economic studies of the creative sector look only at industry employment, so they miss out on all the cultural workers who work in other sectors.

In the following cases, Mt. Auburn made adjustments to the raw EMSI data in order to reach better estimates of cultural employment in cases where a category was too general:

- including just 30 percent of the jobs in the construction-related industry and occupation codes that are part of the preservation and heritage segment, in order to exclude work unrelated to historic preservation (a conservative estimate according to past interviews);
- counting only 80 percent of the employment in "cafeterias, buffets, and grill buffets" and "full-service restaurants" in order to eliminate jobs at non-local chain restaurants from the culinary segment (an estimate based on past survey information);
- including just 70 percent of drinking establishment employment as part of the entertainment segment (based on past inventories of establishments that hosted regular music or entertainment);
- adding employment in the librarian, library technician, and library assistant occupations to the job count for cultural industries since nearly all library employment is counted as part of very broad government and education NAICS codes; and
- breaking out the large, catchall "independent artists, writers, and performers" industry into the segments using EMSI's staffing patterns data, which provide estimates of the distribution of occupations within an industry. All of the self-employment jobs were divided among the design, visual arts, entertainment, and literary arts segments in proportion to the number of jobs there were in the occupations associated with each segment. The very small number of wage and salary jobs in the industry were counted in the entertainment sector since there is evidence to suggest that most of the businesses in this category are associated with the film and media industries.

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